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ABSTRACT

In an effort to lend technical assistance to rural isolated school systems, the Southeastern Education Laboratory has developed a series of materials and strategies to bring all available resources to bear on local educational problems. First in a series of 7, the "Comprehensive Planning Guide" was developed to assist local school planners in assessing educational needs and in systematically planning strategies to meet these needs. The guide includes (1) instructions for a survey and inventory of needs, (2) establishment of need priorities and suggestions for allocation of resources, and (3) ways to plan program action. School administration, the community, the instructional program, personnel, facilities, special services, and finance are discussed in separate chapters. Tables, charts, and sample forms and questionnaires are included. (JH)

SEL PATHWAY SERIES

1

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SEL PATHWAY SERIES

1. Comprehensive Planning Guide
2. Organization for Instruction Program
3. In-Service Training Program
4. Reading Program
5. Dropout Reduction Program
6. Preschool Training Program
7. Communication Skills Program

March 1970

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Comprehensive Planning Guide include Paul Orr, Doyne Smith, and Robert H. Hatch.

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INTRODUCTION

Background of SEL Pathway Series

Since the inauguration of the various Title programs implemented under the Elementary and Secondary Education Act of 1965, many school systems which needed federal assistance have not obtained funds. Although there are various reasons for this failure, many of the rural isolated school districts which have a majority black school population simply lack the manpower and resources with which to assess needs and to construct plans that will be funded. The Southeastern Education Laboratory received a special contract with the U. S. Office of Education in April 1968 to lend technical assistance to certain rural isolated school systems and to determine how the Laboratory might develop materials and strategies that would bring all available resources to bear on local educational problems to these and other economically poor districts.

Discovering Pathways the First Year

Based upon the experiences gained by working closely with five school systems and reviewing the Coleman Report[1] and subsequent reports such as the Summary Report[2], which identified common needs and problems among many rural isolated systems in the Southeastern United States, the Laboratory developed seven illustrative Title III programs. Five of these programs were funded and became operational. SEL staff members monitored the projects and, in some instances, participated in evaluation phases during 1969. After one year of operations, staff members met with local and state Title I and Title III officials from Georgia, Alabama, South Carolina, Mississippi, Florida, and Tennessee to determine how the original illustrative programs could be improved.

---

[1] James S. Coleman, and others, Equality of Educational Opportunity. A report prepared for the U. S. Department of Health, Education, and Welfare, 1966.

Second Generation Pathways to Better Schools

Suggestions for improving the original seven programs focused upon the difficulties encountered by local school officials in assessing needs and resources prior to selecting strategies. Several consultants stated that local proposal writers sometimes construct programs for which no trained personnel are available for implementation; others select strategies which are inappropriate to the actual needs of the school system. It was concluded that the second generation Pathway Series should include materials which would assist local school planners in assessing their needs and systematically planning strategies to meet these needs. The Comprehensive Planning Guide, Number 1 of the SEL Pathway Series, was created to serve this purpose. The Guide includes (1) instructions for a survey and an inventory of needs; (2) suggestions for allocation of resources to needs and establishment of need priorities; and (3) ways to plan for program action. By using the Guide, together with other sources of information, local school personnel can readily identify strategies that will aim to ameliorate a major educational problem. It is recommended, therefore, that this Guide be used prior to using any other Pathways in order to determine precisely what programs are necessary in problem solving.

---

[2] A Summary Report of Six School Systems. A report published by the South Florida School Desegregation Consulting Center, School of Education, University of Miami, Coral Gables, Florida, 1968.

The six others in the Pathway Series are second generation programs which deal with particular problems identified in the Summary Report. They are illustrative in nature and are intended to suggest ideas to local planners about the content and organization of a written Title III proposal. Each program is presented according to the Title III format of the PACE Manual so that the information contained in the Pathway Series is programmed for the reader. The information is divided into two major divisions: (1) Case Commentary and (2) Illustrative

Case. The Case Commentary appears on the lefthand side of each page. The content is intended to be instructive concerning each section of the Title III proposal format and the topic under consideration. Elements include:

A. Title III Guidelines

A brief summary of major points included in the state guidelines for Georgia, Alabama, Florida, Mississippi, and South Carolina;

B. Suggested References

Sources of information and research studies pertinent to the topic of the Illustrative Case and to the section of the Title III format under consideration;

C. Ideal Statement

A statement pertaining to the proposal outline in which suggestions are made that are intended to enhance the quality of the content; and,

D. Critique

A brief commentary which identifies major strengths and weaknesses of the Illustrative Case and remedies which could have been employed.

The Illustrative Case appears on the righthand side of the page in each of the Pathway Series programs and is an actual Title III proposal which has been funded or submitted for funding. The proposal illustrates how one local school system presented its needs, strategies, outcomes, and evaluation plans. The illustration appears as it was originally submitted for funding except for certain editorial changes considered necessary for clarity and consistency. Some portions also have been omitted for the sake of brevity, and the names and places in the Illustrative Case have been changed to preserve anonymity.

It is hoped that the packaged *SEL Pathways to Better Schools Series* will be useful from the initial planning stage to the summative evaluation report. Although the present *Series* more nearly approximates this ultimate goal, it is by no means perfect and awaits further testing before additional work can be done. The total program includes:

1. Comprehensive Planning Guide
2. Organization for Instruction Program
3. In-Service Training Program
4. Reading Program
5. Dropout Reduction Program
6. Preschool Training Program
7. Communication Skills Program

Pathways are Suggestive Rather than Exemplary

A few words of caution need to be made about using the *Pathway Series*. It should be pointed out that the content of the illustrative proposal and the suggested references and statements made about each section are intended to suggest rather than to dictate how a proposal should be written or strategies should be employed. The selected proposals are used only as examples; they demonstrate both superior and inferior qualities. Since each school system has problems and resources which are unique in each instance, it is probable that most of the information contained in the illustrative Title III proposal will not have direct application to most other school systems. Hopefully, the information will suggest the type of content which is necessary and the critique will serve to assist the planner in making the presentation of his own plan qualitatively and quantitatively better.

The information contained in the SEL Pathways to Better School Series is not intended to replace the use of state guidelines manuals or other materials required by state education departments, or the assistance of state department of education officials in planning. Rather, rural isolated school systems are encouraged to acquire as much assistance as they can to insure successful planning and implementation.

With this information in mind, it is hoped that many rural isolated school systems can employ the

SEL Pathway Series in the manner in which it was intended: to assist in alleviating educational disadvantagement in the Southeast and the nation.

Kenneth W. Tidwell

Kenneth W. Tidwell
Executive Director

March 1970

HOW TO USE THIS DOCUMENT

A Comprehensive Educational Planning Guide is based on the assumption that the aggregates of needs reflect the true educational needs of the school system. The survey of needs should include information drawn from students, teachers, parents, school board members, school administrative staff, lay advisory groups, and other interested citizens and agencies of the local and state community.

Facilitation of this survey can be accomplished through the appointment of a steering committee by the school superintendent. The steering committee might be composed of the superintendent as chairman, three teachers from different grade levels and subject matter areas, a parent, a school board member, an interested community agent, and a professional from the state department of education. This steering committee should construct or select the survey instruments. The survey of needs should emphasize the instructional program as the focal point of all need categories. Generally, the need categories are overlapping functions which are directly involved with the instructional process or are supportive to the instructional process. The categories of needs that are direct functions of the instructional process may be, for example, Instructional Personnel; Instructional Materials and Equipment; and Special Services (as modes of instruction). The categories of needs characterized as support functions may be, for example, Facilities, Transportation, and Non-professional Personnel. Although finance is considered to be a vital aspect of educational change, it is only a reflection of some direct or support need for the improvement of the instructional program. Consequently, finance must be inventoried as a resource and must be considered in terms of reallocation and the securing of additional funds from the local, state, or national level.

A survey of educational needs may be constructed on the basis of these categories. The construction of questions asked in each category would be affected by the population upon which the survey would be taken, e.g. students, parents, or teachers. The following questions for high school students, parents, and teachers are used as examples:

Students

1. What new areas or subject matter instruction would you suggest in order of their interest and importance to you? Why is each one important or of interest to you?

2. What areas or subject matter instruction currently available do you think should be dropped from the school program?
Why should they be dropped?

Parents

1. What new courses or programs do you feel should be added to the high school curriculum for your child and why?

2. What currently available high school courses and/or programs do you feel should be dropped from the curriculum and why?

Teachers

1. What new courses or programs do you feel should be added to the high school curriculum and why?

2. Assume that the courses or program you teach are to be dropped from the curriculum, how would you justify the continuation of the courses and/or the program of studies you teach? Comparatively speaking, rank the program of studies and/or courses you teach in their order of importance insofar as meeting the needs of students, with all other programs and/or courses in the school curriculum.

The answers to these questions would give indications of need aggregates in the instructional program category. These high school need aggregates, along with other population need aggregates using similar and additional attitudinal survey questions in other categories, could give subjective data for a survey of needs.

More objective data may be assessed from hard data aggregated from an inventory of school system resources. For example, the school system achievement testing of fifth grade students over a five-year period might reveal that, regardless of the normal mean of group data, the mean of reading vocabulary is significantly higher than that of reading comprehension for each year of five years of a testing program. It might be found that the teachers of grades 1-3 received their teacher training when phonics were emphasized. Further, the textbooks utilized in the first three grades might emphasize phonics. Finally, parents of these children might indicate on a subjective survey of school needs that their children do not understand what they read. It should be obvious in the synthesis of these need aggregates that an in-service training program in the teaching of reading and new instructional materials in the reading program is needed to improve the instructional program.

An _Inventory of Resources_ should reflect what is in current use and what is available for use by the school system. The suggested areas of inventory are arranged in the order of their accessibility to the school system. The need categories outlined above may be inferred in the following suggested areas for inventory:

I. School Administration
II. Community
III. Instruction Program
IV. Personnel
V. Facilities
VI. Special Services
VII. Finance

Examples of the kinds of questions that may be asked on a questionnaire and an inventory of resources are illustrated at the end of each section. The sample questions involve the use of certain vague terms that indicate some criteria for judgments such as adequate, excellent, sufficient, and the like. These words should be replaced by more specific criteria by using the school system's own state law or state department of education guidelines. Where specific criteria have not been set by state law and/or state department of education guidelines, then the steering committee should state these questions with specific criteria. Supporting documents and rationale for the eight suggested areas of inventory and functions of need are included throughout the chapter.

In summary, the following outline for the essentials of a school system Guide for a Survey of Needs and an Inventory of Resources is suggested:

A. Composition for a steering committee to initiate Comprehensive Educational Planning (CEP) and the first step of the CEP, i.e. Phase I, as defined:

1. Three teachers (from different age response levels and subject matter specialties)
2. Student
3. Parent
4. Board members
5. Community citizen
6. Superintendent - Chairman
7. State department of education representative

B. Populations for an attitudinal survey of school system needs:

1. Teachers
2. Students
3. Parents
4. School board, administration, and other staff
5. Lay advisory groups and other interested citizens and agencies

C. Inventory of school system resources:

1. School administration
2. Transportation
3. Instructional program
4. Personnel
5. Facilities
6. Special Services
7. Finances

D. A paradigm for needs assessment categories and the emphasis of needs assessment:

INSTRUCTIONAL PROGRAM
(For Changes in Student Behavior)

(K-12)

Direct Functions

a. Instructional Personnel--Teachers and Aides
b. Instructional Material and Equipment
c. Special Services--Guidance, Food Services

(Adult)

Support Functions

a. Facilities--Fixed Plant, Plant Maintenance and Development
b. Transportation
c. Support Personnel--Administrative and other Non-instructional Personnel

Since the Southeastern Education Laboratory has a vital interest in the improvement of education in the Southeast and the nation, there is a three-part mailer on the following page which will serve to keep SEL informed about the application of this and other documents in the Pathway Series. The reader is encouraged to fill out the card specified for each phase of planning and implementation. This will enable the Laboratory to evaluate the Pathway Series.

Cut here

PHASE I - Planning (Fill out after using PATHWAY for initial planning)

☐ I found this document useful during planning in the following ways: ______________________________

☐ I did not find this document useful.

☐ I wish to contact someone at Southeastern Education Laboratory regarding suggestions I have for improving this document.

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1I

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PHASE II - Draft of Proposal (Fill out after using PATHWAY for constructing proposal)

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☐ I wish to contact someone at SEL about reading and reacting to this draft of the proposal.

Name ______________________________
Title ______________________________
Address ______________________________

1II

Cut here

Cut here

PHASE III - Funding & Implementation (Fill out after receiving acceptance or rejection of the proposal)

☐ The proposal as written was rejected on __________ (date).

☐ The proposal was funded and implementation will begin ________ (date).

☐ The Pathways were helpful in constructing an acceptable program.

☐ The Pathways were not helpful.

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☐ I wish to contact someone at SEL about assisting or recommending persons who can assist in implementing this program.

Name ______________________________
Title ______________________________
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1III

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CHAPTER I

SCHOOL ADMINISTRATION

The central purpose of administration in an educational enterprise is that of directing and organizing personnel and material resources toward the achievement of its goals and objectives. Towards the accomplishment of this achievement, history reflects a perspective that held boards of education responsible for the administration of the schools, even to detailing exact duties that each member of the board would perform. Recently, relatively speaking, states have enacted provisions allowing boards to delegate administrative responsibilities, to establish certificate requirements for administrators, and to delineate duties to be performed.

Whether or not educational administration has a special uniqueness is conjecture; certainly it has much in common with other forms of administration, e.g. hospital, business, public. That it was the last form of administration to be publicaly recognized is less debatable. Regardless, if the assumption can be made that educational administration possesses unique characteristics and that the local school district is something apart from state and federal government, then this separateness is the major uniqueness. The association of school district government with other forms of government and public administration is undeniable; they are public in nature and depend on their constituents for support and major policy formulation. Conversely, however, the administration of a school system differs from the administration of a hospital; any administration must be viewed in the context of its operational environment.

To approach realistically an understanding of administration, careful consideration should be given to unique aspects of educational administration, to administrative functions, to administrative organization, to administrative process, and to administrative skills needed for the administrator to function effectively. To attempt to reach this understanding, planners should familiarize themselves with all facets of the administration or they should explore the stature of the superintendent; and they should acquaint themselves with the total administrative hierarchy and its roles and functions.

Board of Education

Despite the fact that public education is a state function, the responsibility for administering the public schools, since the establishment of the first public schools in Massachusetts in 1635, has generally been delegated to individuals in the community served by the schools. The migration of early settlers away from highly populated areas, the simple educational needs of these people, their desire to maintain their own national and religious heritages, and the general resistance on the part of these people to a strong central government all contributed to this decentralization of school control.

As the size of the communities increased and as school administration became increasingly complex, control of the schools gradually passed from the community as a whole (town meetings) to a governing body which exercised the community's responsibility. In 1826, Massachusetts enacted a law requiring the establishment of a separate school committee in every town in the state and prescribed as its function the direction and control of the schools of the town. This method of school control was used as a model for administering the schools in the newly settled areas of the country. The local board of education became, therefore, the instrument through which the state exercised its responsibility for educating all the children within its jurisdiction.

Although boards of education have been established in every school district in the country, the powers and duties of the local boards vary widely. As an agency of the state legislature, the board and its actions are regulated by the state constitution, various legislative enactments (statutes), rules and regulations of the state education agency, decisions of the courts, and societal demands.

The school board has certain legal relationships with the functioning of the school organization. In functioning, the school board has certain discretionary authority, certain ministerial functions, and has been granted permissive authority to act.

Discretionary Power

The board has been given the authority to act provided it wishes to do so. No legal requirement prevails specifying that a certain act must be performed. For example, boards are given the power to make changes in the curriculum. Even though changes are needed, the board is not liable for failure to act; in most cases liability does not exist even though the board acts negligently, provided the board acted within the discretionary powers granted it.

Ministerial Functions

The board has been ordered to act by law. This action must occur regardless of the presence, in the minds of the board, of conditions which make it desirable not to perform that act. For example, most states specify the minimum number of days school must be in operation. Even though the public fails to provide, tax-wise, sufficient funds to meet this minimum standard, the school board must operate the school for the minimum number of days.

Permissive Authority

Certain acts are permissive in nature. The legislature merely says that guidelines are established; failure of boards to meet these guidelines is not, in itself, a cause for liability.

Most court interpretations have held that in all matters where the board is empowered to act, it must perform that act as an entity. Individual members may perform ministerial duties for the board; they may not act in behalf of the board.

Although the quality of school boards has improved greatly in recent years as the public has become increasingly aware of the importance of the educational enterprise, few boards possess the educational acumen or the time to administer the school system. For example, while boards may formulate school policy, the execution of those policies should be left to the superintendent and his staff. A clear understanding between the board and superintendent as to the functions to be performed by each is crucial if the school system is to be operated in an efficient manner. Members of boards must realize that the function of a board of education is to see that the schools are efficiently run, not to run them.

Number of Members

The number of members composing a local school board varies widely from state to state and district to district within a state. In three-fourths of the states, however, the number of members on any board varies from three to nine. The typical state requires five to seven members.

The number of board members in five Southern states is shown in Table 1.

Table 1

SIZE OF BOARDS OF DIRECTORS
IN FIVE SOUTHERN STATES*

STATE	BOARD SIZES WHERE THE NUMBER OF MEMBERS IS UNIFORM		BOARD SIZES WHERE THE NUMBER OF MEMBERS VARY
	Without Exception	Exception where legislation specifies otherwise	With exact numbers specified
1. Alabama		5	
2. Florida	5		
3. Georgia		5	
4. Mississippi	5		
5. South Carolina			3, 5, 7

*U. S. Department of Health, Education, and Welfare, Provisions Governing Membership on Local Boards of Education, No. 13 (Washington, D. C.: U. S. Government Printing Office, 1957), pp. 4-5.

Length of Term

Most school board members are selected for terms of from three to six years with a four-year term usually specified. Generally, there are no restrictions on the number of terms which a member may serve.

Provisions are usually made for the majority of the members of the board not to retire or stand for re-election at the same time. Generally, a certain contingent of the board is selected either annually or biannually. In almost all states, therefore, there is some type of overlapping terms of office.

How Secured or Selected

Election by popular vote on a nonpartisan basis, a practice in harmony with the recommendations of most educational authorities, is the predominant method of selecting school board members in 42 states. The United States Office of Education estimates that more than 95 percent of local school boards are elected.

Nonpartisan popular election is recommended because it permits the public to express itself directly on school matters, gives school board members a feeling of responsibility to the electorate, and is an effective weapon against politics in school affairs. Although appointive methods of selecting members occasionally work well, appointments by councils, judges, and the like are generally frowned upon by educational authorities.

Table 2 shows how local school board members are selected in the five Southern states.

Table 2

MEMBERSHIP ON BOARDS OF DIRECTORS
IN FIVE SOUTHERN STATES*

STATE	ELECTED OR APPOINTED
1. Alabama	Elected in some districts (partisan)
2. Florida	Elected (partisan)
3. Georgia	Appointed (in some districts)
4. Mississippi	Elected in some districts (nonpartisan)
5. South Carolina	Appointed

*U. S. Department of Health, Education, and Welfare Provisions Governing Membership on Local Boards of Education, No. 13 (Washington, D.C.: Government Printing Office, 1957), pp. 4-5.

Why individuals seek office as board members is both interesting and important. Table 3 shows reasons and percent of respondents in a particular section of the country. This study is representative of most research done in this area.

Table 3

REASONS INDIVIDUALS SEEK OFFICE*

	REASONS	PERCENT
1.	General interest in education	37.6
2.	Civic-duty or community service interest	33.0
3.	Influenced by friends, relatives, or acquaintances	33.0
4.	Children in school and a desire to see that they had a good education	24.0
5.	Felt the capacity to serve	15.6
6.	To represent a group in the community	10.1
7.	Opposed a school board policy	9.2
8.	For self-satisfaction	7.3
9.	Interested in seeing that the taxes were properly administered	7.3
10.	Opposed to a school board member	6.4
11.	Appointed	6.4
12.	Ran because of the reorganization issue in the district	3.7

*Goldhammer, Keith, The School Board (New York, N. Y.: The Center for Applied Research in Education, Inc.), p. 87.

Qualifications

Qualifications for school board membership are specified by state law in all states except Rhode Island. Typically, however, these qualifications merely require that members be qualified voters. Four states do require that members must be of a certain age, 10 states stipulate length of residence in the state or district, 11 states have educational requirements, 5 states have laws relating to the morals of board members, and 7 states have laws stipulating that board members must pay taxes or be a parent. State requirements for board membership are, as the above information indicates, far from rigorous.

Apart from the legal qualifications set forth by the states, there is no magic set of qualifications or characteristics which a board member should possess. In general, board members should be successful in their work, have school-age children, have as much education as possible, and have "good" reputations in the community. Boards should be representative of the community as a whole and not, as is usually the case, just the upper classes. Table 4 is a compilation of number of studies on characteristics of school board members.

Date of Meetings and Frequency

In most states the statutes prescribe the frequency of school board meetings, or at least require certain meetings to be held on given dates. Most boards of education transact all school business in either monthly or semi-monthly meetings. In most cases, these meetings are held on the same day of the week each month.

There are, in general, three types of school board meetings at which business may be transacted: regular, adjourned, and special.

Table 4

CHARACTERISTICS OF SCHOOL BOARD MEMBERS+

Author	Year of Study	Geographic Area Represented	Percent of Board Members in Professional, Technical, or Managerial Positions	Percent of Board with Some College Education	Mean Income of Board Members	Percent of Male Board Members	Average Years on School Board	Median Age	Percent of Members with Children in School
Counts	1927	United States	55	50	$4,000	85	4.1	48.3	***
N.E.A.	1946	United States	43	33	***	90	6.7	48.5	***
Brown	1951	United States	69	67	9,000	86	***	***	53
Woods	1954	West Virginia	40	26	4,250	98	8.5	53.4	49
Coughran	1956	Illinois	66	50	***	93	6.0	49.0	50
Teal	1956	Pennsylvania	50	50	6,000	***	7.0	47.5	50
Albert	1958	United States	52	72	11,968	82	6.0	48.6	70
Reber	1959	California	66	***	12,000	83	5.0	47.5	80
Tiedt-Garmire	1961	Oregon	61	63	9,000	91	4.7	42.5	92
Proudfoot	1962	Alberta, Canada	44	25*	6,900**	94	4.5	45.8	80

*Does not include attendance at nondegree-granting institutions.

**Median, not the mean, income.

***Data were not obtained on this item.

+Goldhammer, Keith, The School Board, (New York, N.Y.: The Center for Applied Research).

Regular

The regular meeting is characterized by:

1. A prearranged schedule (once or twice a month).
2. Being open to the public unless personnel or financial (certain types) matters are to be discussed.
3. No limitation being placed upon the nature of the business that can arise.
4. The right of the board to establish its own rules, regulations, and policies relative to conduct at the meetings.
5. Having a prepared agenda, usually submitted by the superintendent.

Adjourned Meeting

The adjourned meeting is a continuation of a regular or special meeting.

Special Meeting

The special meeting is characterized by:

1. Meeting for a particular purpose at a time other than the time scheduled for a regular meeting.
2. The board's legal right to meet at any site (authorities in this field suggest that special meetings should be held at the same site as regular meetings).
3. The fact that the call for the special meeting must state the nature of the business to be transacted.
4. The fact that no business shall be transacted which does not appear on the call.

Agenda, Minutes, Time, and Site

Most authorities suggest that a board meeting should be held in accordance with a predetermined agenda submitted by the superintendent. Board members who suggest items for consideration at meetings should do so in advance of the actual meeting. This allows the administrator time to study each item thoroughly.

The administrators should forward to each board member all pertinent data relative to each item submitted for consideration.

An official set of minutes must be kept of all transactions occurring at each meeting and formally recorded in an official book. A record of official action, though legally sound, isn't sufficient; enough data should be recorded whereby others may use these data to interpret board policies.

The time spent in board meetings is flexible although many boards supposedly adhere to a time schedule. Boards meet during the day, the afternoon, evening, night, and the weekend. Three hours at one meeting is ample time and two hours might be more appropriate.

Large school systems usually have a board room with space allocated for the press and the public. Small systems usually hold meetings in any space available with no designated space for the press. Boards should avoid, as much as possible, informal type meetings.

Superintendent of Schools

The first significant step toward the creation of school-administrative machinery occurred when school boards were established to perform certain administrative functions. As education became increasingly more important and more complex, and as school systems began to consolidate, boards of directors came to realize that special assistants were needed if the schools were to be properly administered. Some 200 years after the establishment of the first public schools, the first city superintendency was established in Providence, Rhode Island. Approximately 60 years elapsed before an appreciable number of cities began to develop the superintendency. Even at that point in time, boards of directors displayed a marked reluctancy in delegating authority to newly designated superintendents.

The office of the school superintendent has now proved its worth and attained professional status; during recent decades, as professional training and qualifications increased, the responsibilities of the superintendent multiplied. Although the tasks of the superintendent are numerous and complex, a summation might include: (1) improving the educational opportunity for all students in his system;

(2) obtaining and developing personnel; (3) providing and maintaining funds and facilities; and (4) promoting effective public relations with the community.

Selection of Superintendents

The superintendent of schools is, generally, selected in one of two ways: (1) by the vote of the people of the school district, or (2) by appointment by the local board of trustees. Contrary to earlier practices, school-administrative positions are being awarded more and more on the basis of qualifications; the field of selection is usually nationwide. A general tendency toward the appointment of superintendents rather than popular election seems evident, although many state and county superintendents are elected.

Research does not indicate the manner in which the board should handle its selection responsibilities, but agreement exists that the process should be orderly and systematic. The following steps in the selection process are recommended:

1. The board meets with those persons who can offer advice on the procedures which should be established.
2. The board sets up the mechanics of selection.
3. All applications and credentials are screened.
4. A standard interview procedure is developed with the aid of consultants.

5. The board selects an agreed-upon number (usually three) whom they believe to be the top candidates for the position and invites them for interviews.
6. Two or more board members visit the communities of the top candidates.
7. The leading candidates may then be invited back for further interviews, this time bringing their wives with them.
8. The board then selects the new superintendent. Every effort should be made to obtain unanimous vote.
9. Prior to appointment, the successful candidate is asked to take a complete physical examination and submit a report to the board.
10. After the candidate has accepted the superintendency, a public announcement of the appointment is made.[1]

The appointment of the superintendent of schools is the most crucial act which a board must perform, for more than any other person the superintendent determines the success of the system.

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[1] Griffiths, Daniel E., The School Superintendent (New York: Center for Applied Research in Education, 1966). pp. 61-63.

Form I suggests a guide that boards may use in interviewing any administrator. Note that parts 1 and 2 are information that should be in the hands of board members when the interview occurs.

Form I

SAMPLE INTERVIEW GUIDE: SUPERINTENDENT*

Name of candidate	Recommended by	Present position
Date of interview	Age	Marital status

1. Academic Training

    a. What undergraduate degree is preferred?__________________
    b. What level of advanced degree is preferred?_____Required?___
    c. Is Ph.D. or Ed.D. preferred?_____________________________
    d. Does academic training qualify for superintendent's certificate?______________

2. Educational Experience

    a. What experiences as a classroom teacher?__________________
    b. What experiences as a principal?__________________________
    c. What experiences as a superintendent?_____________________
    d. Any other administrative experiences?_____________________
    e. Other educational experiences?____________________________

3. Personal

    Personality characteristics--Board members' individual considerations of candidate; any questioning which elicits information to support or reject any opinion formed about the individual.

4. General

    a. Explore personal life--place born, public schools and colleges attended, family, community interests. (Get candidate's background)

b. Explore his educational background--ask candidate to talk on training and experience. (Question sample: What do you think is the most valuable competency you received from academic training?)

c. Explore his ideas on a school system. (Question samples: What do you think is a good school system? How would you determine by good evaluative procedures whether the system is good?)

d. Explore his role concepts. Elicit information on what the candidate thinks about his role, the board's role, all other administrative personnel's roles, the teachers' roles.

e. Explore his concept of community and school relations. (Sample questions: What procedures would you use to inform the public? Describe experiences that involved working with citizens on school problems. Relate your philosophy regarding citizen participation in school affairs. How would you use citizens?)

f. Explore his ability to change. (Sample questions: How would you improve the abilities of our professional staff and/or staffs you have worked with in the past? How would you start to improve the instructional program in a system like ours?)

g. Explore his ability to solve problems. (Sample questions: What major problems have you faced in your present or past administrative positions? How did you solve them?

h. Explore reasoning and whys. (Sample questions: What do you think would be your most important function as our chief administrator? What do you think are your chief assets? Abilities? Why do you want to change jobs and/or work here?)

Evaluation: Excellent____Outstanding____Good____Fair____

Note: Place a check mark on the predetermined checklist which most nearly describes your feelings about his answers to each question.

*Criteria and Procedures Suggested for Use in Selecting a Chief School Administrator (Albany, New York: Council for Administrative Leadership, 1961).

Qualifications

Generally, the basic legal qualifications for the superintendent of schools are set by the State Board of Education. Most states require the superintendent to hold at least a master's degree in the field of school administration with a specified number of years of school experience. Some states do not have legal requirements which must be met by candidates for the superintendency; however, this situation is fast disappearing.

Qualifications, beyond those set by the state, must be decided upon by the board, and will, of course, be partially determined by the type and size of community and by the salary which can be paid.

Regardless of the size or financial status of the district, a superintendent of schools should possess certain qualifications. The following are suggested:

1. He should be well educated and highly cultured.
    a. The structured interview will elicit most of this type of information.
    b. Supportive data could include:
        (1) Test in area of desired competency of Graduate Record Examination.
        (2) Examination of undergraduate program.

2. He should possess certain personal attributes that reflect a consistency in behavior.

    a. Ability to lead

        (1) Can the candidate get a job done through other people?

        (2) Does he present well-developed plans to the board and the faculty?

        (3) Does he build good human relations with his associates?

    b. Ability to perform

        (1) Does the candidate finish each job that he starts?

        (2) Does he know his job?

    c. Ability to bring about desired changes

        (1) Can the candidate bring about changes without revolution?

        (2) Are conditions worse after the change than before?

    d. Ability to demonstrate inner security

        (1) Can reasonable people disagree with the candidate?

        (2) Does he give evidence that another man's self-respect is as important as his own?

    e. Ability to live with uncertainty

        (1) Can the candidate work under pressure?

    f. Ability to conceptualize

        (1) Can the candidate see the whole picture?

        (2) Does he see the great purpose of education in the modern world?

3. He must have previous educational experiences.
    a. At least three years experience as a classroom teacher.
    b. At least three years experience as an administrator (principal or central office).
4. He must have academic training.
    a. Able to be certified as a teacher.
    b. Graduate of (at least) a two-year program in school administration at a recognized university.

Length of Term

The length of contract or appointment of the superintendent varies markedly, but the length of the contract is closely related to the size of the system. Most superintendents, according to a study conducted by the American Association of School Administrators, are serving under three-year appointments, but contracts for four, five, six, or more years are reported in more than 75 percent of the larger districts in the country. In the smaller districts, appointments for this length are quite rare. Although 89.2 percent of the superintendents reported that they did not have legal tenure, only about one-third were working under appointments of less than three years.[2]

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[2] AASA, Research Division of the National Education Association, Profile of the School Superintendent (Washington, D. C.: The Association, 1960).

Evidence indicates that the school superintendent, along with the college professor, is among the least mobile member of the educational profession. In fact, the average school superintendent will change jobs only twice during his career. The typical school superintendent has been in his present position for several years.

Other Administrative And Professional Personnel

Once the board of education has selected the superintendent, good administrative procedure dictates that the superintendent be delegated the responsibility of selecting his administrative staff. The board, however, retains the right of approval or disapproval.

The actual number of administrative personnel employed, however, varies widely from system to system and depends upon the size of the school system and budgetary considerations. These two variables will often determine whether or not a school system will be able to employ badly needed supervisors or central office personnel.

Charts A and B indicate typical organizational structures of a large and small school system. After a school system has developed its organizational structure, the administrative personnel should be listed with qualifications and responsibilities.

The hiring of personnel for these positions, the application for financial aid which necessitates a description of functions, qualifications, or responsibilities, etc., require that certain information be readily available. A list of the administrative personnel of the system with corresponding qualifications and responsibilities should be compiled. Chart C suggests a procedure using the personnel depicted in Chart A.

Chart A

ORGANIZATIONAL STRUCTURE: LARGE SYSTEM

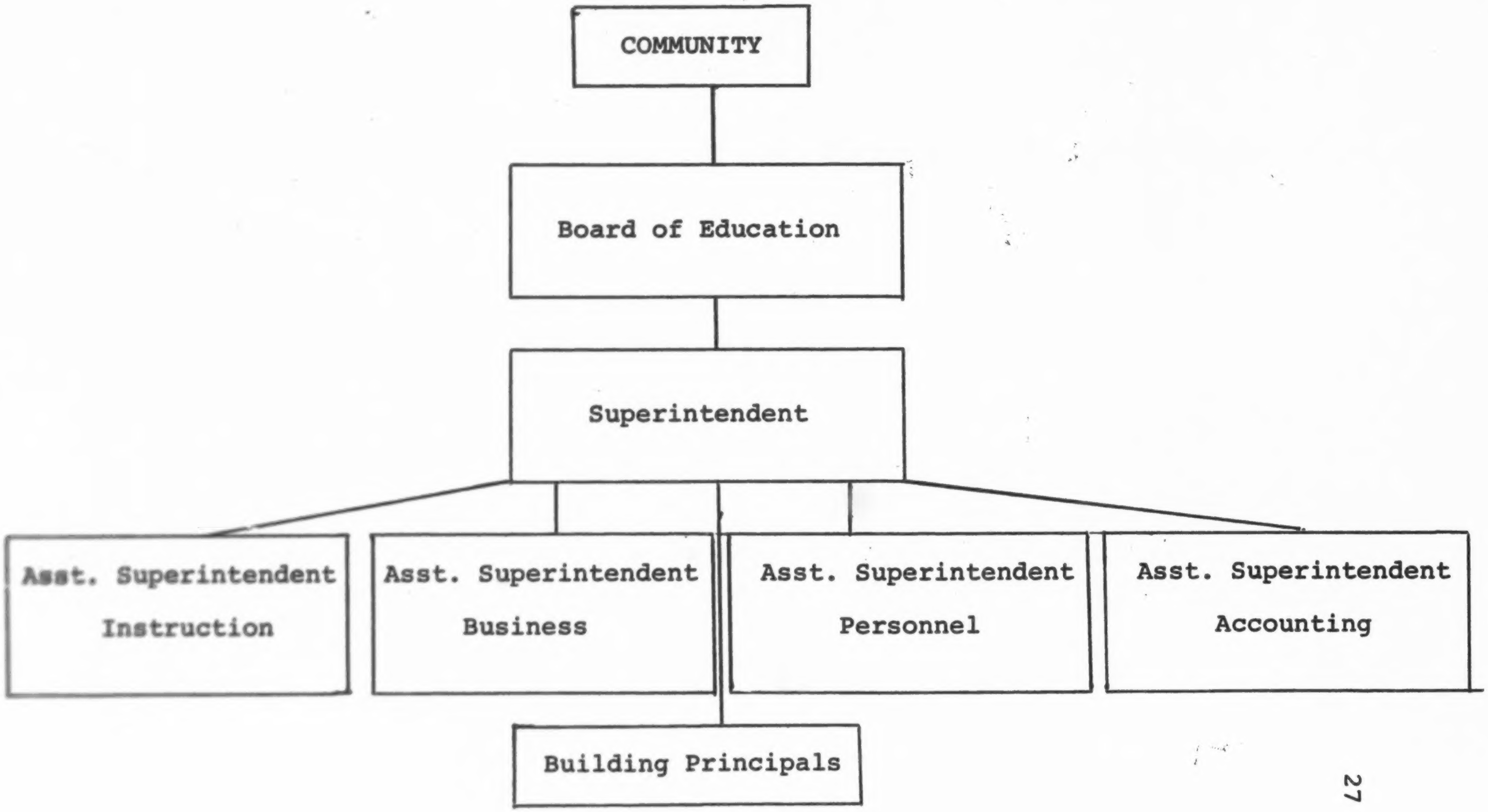

COMMUNITY
Board of Education
Superintendent
Asst. Superintendent Instruction
Asst. Superintendent Business
Asst. Superintendent Personnel
Asst. Superintendent Accounting
Building Principals

Chart B

ORGANIZATIONAL STRUCTURE: SMALL SYSTEM

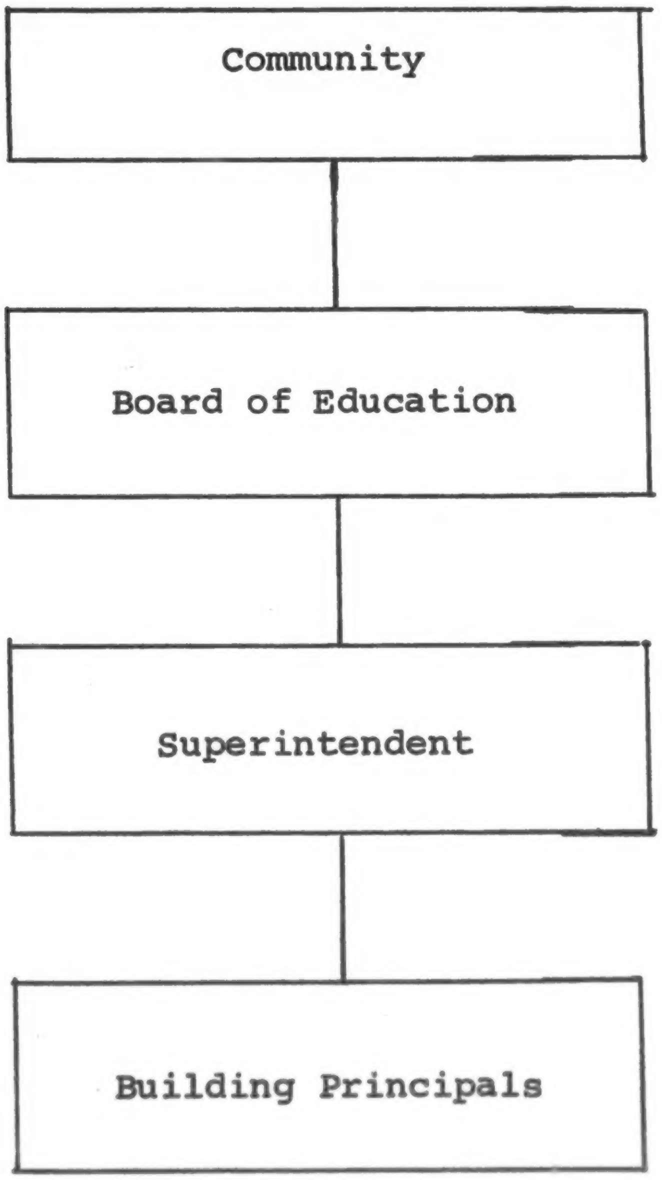

Community
Board of Education
Superintendent
Building Principals

Chart C

ASSISTANT ADMINISTRATIVE PERSONNEL: QUALIFICATIONS AND RESPONSIBILITIES

Administrative Assistant Personnel: By job position and name	Qualifications for Administrative Position	Responsibilities Assigned to this Position
Assistant Superintendent in charge of Instruction (Thomas L. Smith)	1. Masters degree in administration, supervision, or curriculum 2. Three years teaching experience 3. Graduate of an accredited institution of higher education	1. Assist superintendent 2. Improve curriculum 3. Help staff develop instructional goals 4. Help staff develop sound evaluation methods 5. Help develop in-service programs 6. Others

This procedure should be followed for every member of the administrative staff.

Size of Staff

The problem of determining optimum staff size is one which has long engaged professional educators. The task of defining precisely how large the staff of a specified system should be, however, is complicated by many factors. School size, wealth, location, and desire to provide students with the best possible education are all factors which would be considered in deciding upon the size of professional staff. Until the superintendent of schools can demonstrate to the public and to the board why additional assistance is needed, how it will be employed, and how it will make a difference in the education of children, there is little likelihood that greater support for staff increases will be forthcoming.

It becomes imperative that a system, in planning for any eventuality, know exactly how many professional personnel are employed in the system and exactly what each employee's function is. In accordance with the organizational structure presented in Chart A, a procedure that accounts for each professional employee and lists his specific function is shown in Form II.

Form II

NUMBER OF PROFESSIONAL PERSONNEL AND FUNCTIONS

Personnel by Organizational Structure and by Name	Functions: By Individual or Group
PRINCIPALS (5) Ralph Abrams Thomas Dunn John Brown Harold Smith Billy Taylor *	1. Accounting of pupils, census, and attendance 2. Arranging for substitute teachers 3. Controlling pupil behavior 4. Coordinating audio-visual activities 5. Developing pupil reporting procedures 6. Scheduling pupils 7. Scheduling teachers 8. Supervising professional and non-professional staff 9. Others

*All professional personnel can be listed in this manner.

SAMPLE QUESTIONNAIRE
ON ADMINISTRATION NEEDS

A. Board of Education

1. How installed? _______ elected _______ appointed _______ approved

   by whom?__________________

2. Term of office:___________ Number of board members:_______

3. Qualifications:____
   ____
   ____

4. How is chairman of board determined?_______ elected _______ appointed _______ approved

5. How often does chairmanship change?______________________

6. Policy determination
   a. In what areas?__________________________________
   b. In conjunction with whom?__________________________

7. List board members by profession:______________________
   ____
   ____

8. Are board meetings open to public? _____yes _____no

9. Is a written agenda provided for board members?
   _____yes _____no
   a. How is agenda prepared?______________________________
   b. Is agenda given to board members prior to regular meetings? _____yes _____no
   c. Is a careful record of board meetings maintained?
      _____yes _____no

10. Are professional staff members other than superintendents in attendance at board meetings? _____yes _____no

11. Has board and superintendent prepared a written statement of the philosophy and objectives for the school system?
    _____yes _____no

12. Is every board member provided with copy of State School Law? _____yes _____no

13. Is there a written procedure for orientation of new members as to:
    - a. Board meetings _____yes _____no
    - b. Board policies _____yes _____no
    - c. Functions of the board _____yes _____no
    - d. Pertinent information relative _____yes _____no to the entire school operation _____yes _____no

B. Superintendent

1. How installed? _______ elected _________ appointed ________ approved

   by whom? _____________

2. Term of office: ________________

3. Qualifications (describe):
    - a. Training____________________________________
    - b. Experience__________________________________
    - c. Other_______________________________________

4. How long in office?_______________________________

C. Central Office Administrators
1. Titles:____
2. How employed?_____________________________________
3. Describe function by title:________________________
____
____
____

D. Has reorganization of school attendance areas occurred within past 10 years? _____yes _____no
1. If so, when? ______ year
2. Are resulting units larger or smaller in numbers of students served? _________ larger __________ smaller

E. What five major recommendations has the superintendent made to the board in the past year?

CHAPTER II

COMMUNITY

Any description of the accomplishments and aspirations of a school system must be related to the culture, resources, and aspirations of the community served by that school system. A prosperous and growing community usually fosters a high quality school system. Conversely, a community whose inhabitants are economically and socially disadvantaged will not demand or support a high quality school system. But what is meant by the term "community?" We hear references to the "world community," the "community of scholars," the "local community," and one school superintendent refers to a city of 1,300,000 people as a community. While the term is commonly used, there seems to be little commonality of understanding as to what precisely is meant by it.

For purposes of this discussion, community is construed to mean a restricted geopolitical area whose boundaries are accepted by a majority of the area's inhabitants as encompassing their common social, economic, and political interests. A more useful term is "local context" which means the setting within which the school or schools operate. That context is comprised of the history and location of the community; the services, including utilities available to its inhabitants; the use to which land in the community is put; jobs available; and the social, economic, and political characteristics of the community's population.

The political constraints imposed by the local power structure is another component to be assessed as part of the context of the local school and must be considered in any fair evaluation of a school system.

A suggested community and demographic inventory follows.

SAMPLE INVENTORY ON COMMUNITY AND DEMOGRAPHY

A. History

Give a brief history of the community served by the school district including its location relative to large centers of population, its beginning, significant events and influences, growth or lack of growth with reasons for it. Prepare a map of the community. Include a description of the topography of the school district, indicating natural barriers, and the like.

B. Are the following services available in the community? Newspapers: ___daily, ___weekly; ___public transportation; ___expressway; ___parks; ___public playgrounds; ___museum; ___theaters; ___public library; ___civic clubs (name them); ___community college; ___area vocational school; ___churches; ___police; ___sheriff; ___fire protection; ___hospital; ___private clubs; ___youth organizations; ___garbage pickup.

C. How is land used in the community?

_____% Residential	_____% Business	_____% Public housing
_____% Industrial	_____% Farming	_____% Other

D. Are the following utilities provided by the community?

Electricity ____yes ____no Natural gas ____yes ____no
Central water supply ____yes ____no
Sewer ____yes ____no

E. What is the percent of employment in:

_____% Construction
_____% Manufacturing
_____% Farming
_____% Lumbering
_____% Service (gas station, cosmetology, etc.)
_____% Pulpwood
_____% Business
_____% Professional
_____% Wholesale
_____% Schools

F. Give population figures for:

1950 ___________
1960 ___________
1970 ___________

G. What is the percent of population by race?

_____% White
_____% Black
_____% Other Specify____________________

H. What was the school enrollment for the following years:

__________1959-60
__________1960-61
__________1961-62
__________1962-63
__________1963-64
__________1964-65
__________1965-66
__________1966-67
__________1967-68
__________1968-69
__________1969-70
__________1970-71

I. What was the median family income in:

1950 ___________
1960 ___________
1970 ___________

CHAPTER III

INSTRUCTIONAL PROGRAM

A great deal of attention is being centered around planning ways to improve instructional programs in the public schools. How does a local district, or an individual school within that district, develop and implement instructional programs? Who bears the responsibility for seeing that the instructional program meets the needs of each individual attending that school? Who should evaluate the process and the product? Who should recommend changes in existing programs? When should these changes occur?

To answer these questions, notice should be taken of the fact that the organizational structure of the educational enterprise, to be effective, must rest on the nature of how the instructional program is planned. This planning is influenced by many intrinsic and external factors and seems to occur at four levels:

1. The Local System Level: Certain groups, usually community leaders, are delegated the responsibility for planning the general policies which cover the programs of all the schools in the system. The planning body--departmental and grade groups, special committees, representation from all schools,

individuals, and the like--does the work, but the board of education retains fiscal responsibility. All plans must, of course, respect district policies, regulations of the state board of education, and laws of the state.

2. The Local School Center Level: The individual school center population--the faculty with assistance from the community and the students--comprise this planning unit. The total faculty could be involved--grade groups, departmental groups, special interest committees, and so on.
3. The Classroom Level: The most important planning is the teacher's own planning of the instructional program of the group he teaches. This planning occurs with and without student participation. At the classroom level, the planning more directly affects the experiences of learners than at any other level. Any level has little meaning unless the program is implemented at the classroom level. Most of the individual planning at this level consists of choosing within the flexible framework allowed by rules, policies, and regulations.

4. External Level: Certain agencies, neither legally nor administratively related to a school system, influence the organization of the instructional program. Accrediting associations and professional organizations influence planning at all levels; special interest groups, seeking to influence the creation of programs which further their own interests through publications, films, speakers, pressure on legislatures, and the like, also exert pressure on the type of instructional program that school systems have.

Fundamentally, planning for the instructional program is the same at all levels; only the nature of participation differs at each level.

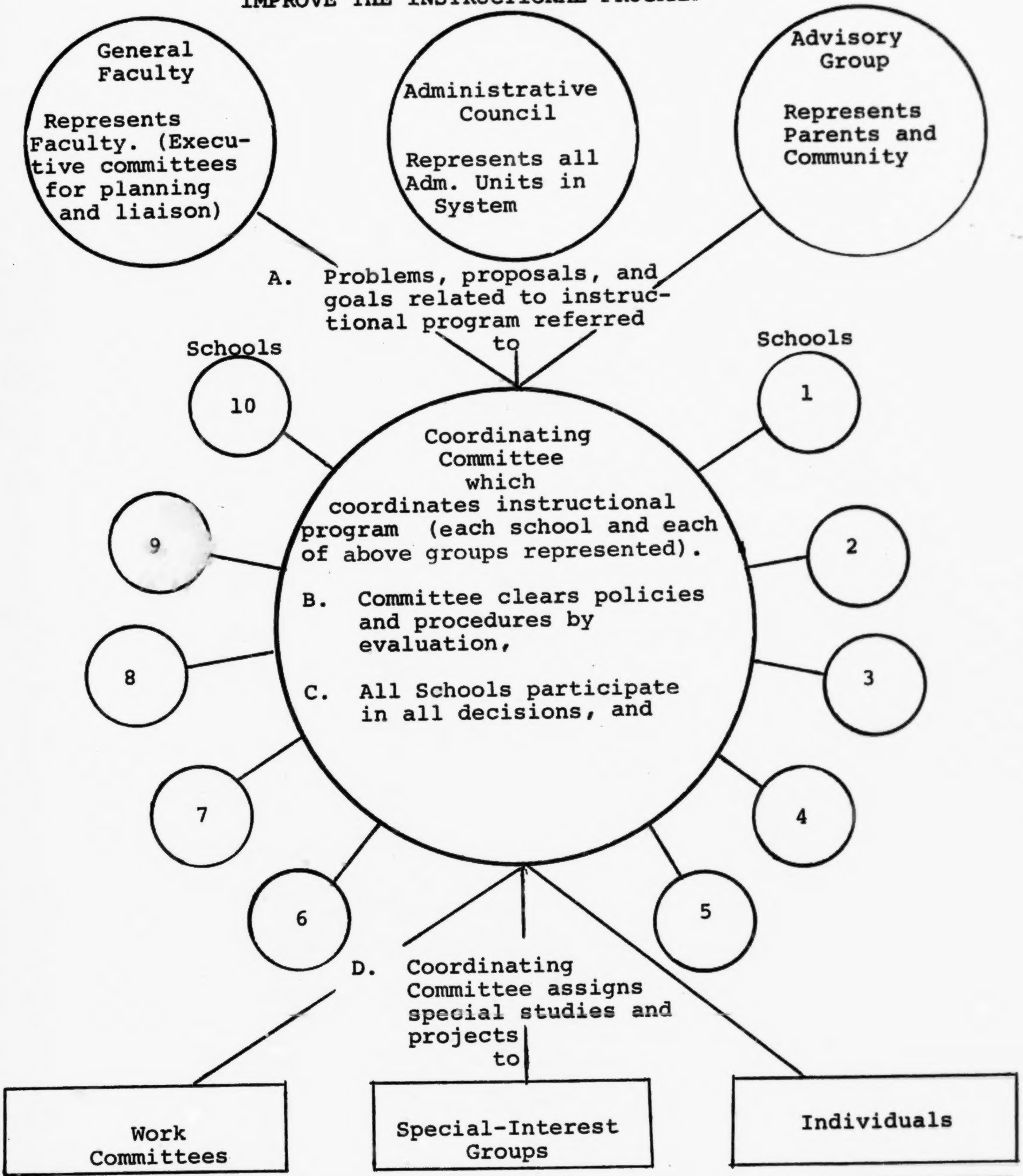
As local education agencies view their instructional programs preparatory to a change, they usually organize effective and efficient instructional programs, and the organizational structure must reflect coordinated participation. Chart D suggests one organization scheme of a school system structured for instructional program development.

Organization

Organization of the instructional program allows two special functions to be served: (1) to classify students and move them upward from a point of departure, and (2) to allocate

Chart D

ORGANIZATION OF A SCHOOL SYSTEM TO IMPROVE THE INSTRUCTIONAL PROGRAM*


General Faculty
Represents Faculty. (Executive committees for planning and liaison)
Administrative Council
Represents all Adm. Units in System
Advisory Group
Represents Parents and Community
Schools
Schools
1
2
3
4
5
6
7
8
9
10
Coordinating Committee which coordinates instructional program (each school and each of above groups represented).
Work Committees
Special-Interest Groups
Individuals

A. Problems, proposals, and goals related to instructional program referred to

B. Committee clears policies and procedures by evaluation,

C. All Schools participate in all decisions, and

D. Coordinating Committee assigns special studies and projects to the number of students enrolled in any given school center among the available teachers. Vertical organization serves the first function; horizontal, the second.

---

*Adapted from Saylor and Alexander, Curriculum Planning (New York: Holt, Rinehart, and Winston, 1962), p. 558.

Extreme caution must be exercised by planners as they plan, initiate, and implement programs. A great deal of confusion seems to arise because of the inability of persons charged with supervisory responsibility of the instructional program to differentiate between vertical and horizontal aspects of school organization. Distinct differences exist between vertical and horizontal organization structures.

Vertical School Organization

A total educational system must be divided into some pattern of organizational units. The vertical pattern, then, merely means that units are stacked one upon the other; this provides for the upward progression of students through a time sequence. If the units were schools, the most common vertical organization would be as illustrated in Chart E.

Chart E

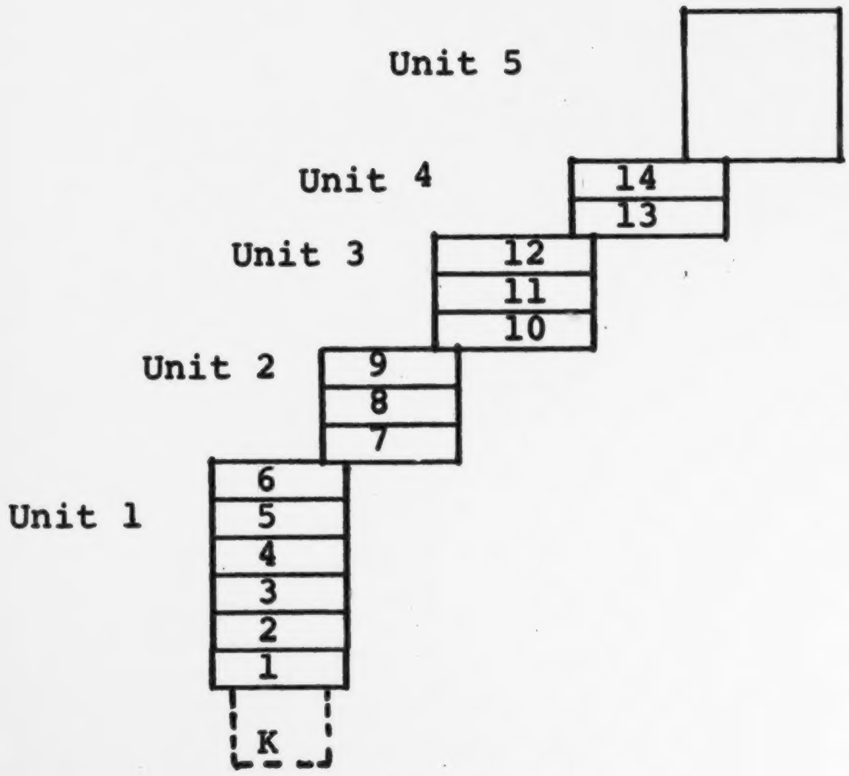
VERTICAL ORGANIZATION OF SCHOOL

Units Schools	
5	Senior Colleges/Universities
4	Junior Colleges
3	Senior High School
2	Junior High School
1	Elementary School

If these units of schools are further subdivided into units of grades, which represent segments of time to be spent and subject-matter content to be covered, this vertical organization would typify most organizational patterns in the United States, as illustrated in Chart F.

Chart F

VERTICAL ORGANIZATION OF SCHOOLS
ACCORDING TO TIME AND SUBJECT MATTER



Junior and senior years of college, graduate division (senior college and graduate school)

Grades thirteen and fourteen (junior college)

Grades ten through twelve (senior high school)

Grades seven through nine (junior high school)

Grades Kindergarten and/or one through six (elementary school)

The major structural units, represented in Charts G and H, tend to persist although attempts to modify them constantly appear and reappear at various intervals.

Grading, multigrading, and nongrading are the vertical organizational plans from which to choose.

Grading is the traditional pattern of organization for the vertical progression of children. For example, in Chart G, children, usually 5 to 12 years of age, proceed through 7 yearlong stages, kindergarten through the sixth grade. A year of work for a particular grade is the common denominator for vertical progress. Certain elements are common:

1. Textbooks are prepared for grades.
2. Specific body of subject matter is assigned to each grade.
3. Teachers are labeled "first-grade," "second-grade," and "third-grade" teacher, and so on.
4. Children refer to themselves as being in the "first grade" or going into a grade.

The placement of children in grades separates them from what was studied last year or will be studied next year and walls in what is being studied now. A second-grade student covers material designed for that grade; this mitigates the possibility of deepening insights uncovered in the first grade and extending them into the third grade.

Multigrading, a type of organizational structure of the instructional program, differs from the graded concept in that it is composed of class groups of different grade levels. A certain portion of the class group is new each year. In practice, the actual grade-level classifications are ignored for instructional purposes. Charts G and H illustrate examples of multigrade classes and multiage classes.

CHART G

Multigrade Classes*

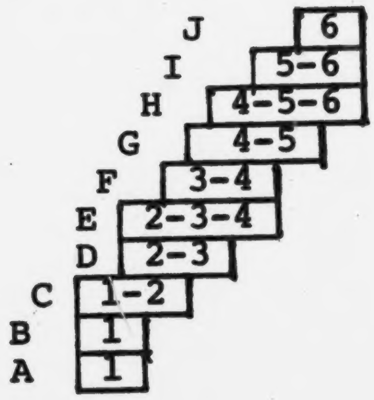
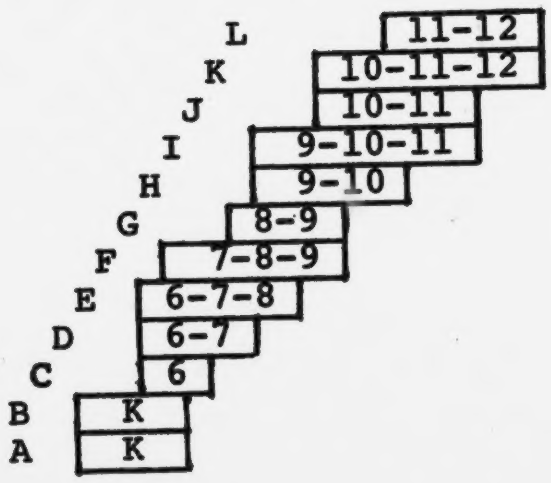

J
6
I
5-6
H
4-5-6
G
4-5
F
3-4
E
2-3-4
D
2-3
C
1-2
B
1
A
1

CHART H

Multiage Classes*


L
11-12
K
10-11-12
J
10-11
I
9-10-11
H
9-10
G
8-9
F
7-8-9
E
6-7-8
D
6-7
C
6
B
K
A
K

NOTE: Letters in Charts G and H refer to a single class group.
Numbers in Chart G refer to the grades encompassed within a class group.
Numbers in Chart H represent pupils' ages.

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*Goodlad, John I., School, Curriculum and the Individual, (Waltham, Mass.: Blaisdell Publishers, 1966), pp. 40-41.

Each class contains about 30 pupils. Alternative placements are available for a child classified in any given grade level. The group can be held together for a period of two to three years (Note: Class E, Chart H), with new members being added to the group each year by teacher recommendation.

A planner should note that this or any other scheme which results in a vertical organizational pattern is no more than a scheme to effect the entrance to and departure from any major unit of vertical organization. No organizational scheme can provide the ingredients of the curriculum, teach the students, or furnish audio-visual aids to the teachers. The multigrade and multiage concepts are schemes to care for individual differences, to develop new subject-matter sequences, and to provide for continuous pupil progress throughout this educational career.

Nongrading is another plan of vertical school organization. This plan requires that grade labels be removed entirely from at least two grade levels. This organizational structure functions to move students of varying abilities and present accomplishments at differentiated rates of speed upward through the specified subject-matter requirements of the unit.

The scheme does not, in itself, improve any part of the instructional program. It does, however, focus attention on differences among children. For example, instead of rewarding the bright child for his easy attainment of common requirements, the teacher directs him to the next tasks, even though they are tasks normally reserved for the next grade in the graded organizational structure. The child might work at several levels in several subjects.

When considering a change in the instructional program to include the nongraded approach, planners should realize that the nongraded organizational plan is supported by persons who differ as to the purpose of a school. The two viewpoints are:

1. It is a structure for more efficiently regulating the progress of learners through relatively common sets of subject-matter prescriptions, or
2. It is a structure within which individual needs, interests, and abilities may be identified and used in fulfilling a more child-centered concept of school function.

Planners should realize that the nongraded approach can serve either function well; failure to clarify the function to be served, however, usually results in confusion, disappointment, failure, and eventual reversion to a graded plan. The following characteristics seem to describe a nongraded program. It has

1. nongrade labels
2. a curriculum that is organized, not in units of time, but in sequential work units which are units of achievements
3. a promotion scheme that rests on progress, not on time spent in a grade
4. intraclass grouping and movement between classes
5. a school-home communications scheme that is emphasized.

For a thorough understanding of the nongraded concept, the planner might read Brown's The Nongraded High School.[1]

Horizontal School Organization

The horizontal pattern is determined by grouping the children homogeneously or heterogeneously, by organizing the curriculum whereby emphasis on separateness of subjects or the interrelationships among them occur, by having self-contained or departmentalized classrooms, or any pattern of interclass grouping. Note that an horizontal structure is the method of dividing students into instructional groups and allocating them to teachers.

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[1] Brown, Bartley Frank The Nongraded High School (Englewood Cliffs, New Jersey: Prentice-Hall, 1963).

Homogeneous and Heterogeneous Interclass Grouping

Interclass grouping merely means that the total school population is divided into instructional groups. This division is based on some criterion of sameness. For example, the division could be based on: (1) intelligence quotient (IQ); (2) achievement; (3) weight; (4) sex; (5) interests; (6) socioeconomic class; (7) study habits; (8) occupation of parents; (9) marital status of parents, and so on.

Instructional leaders should ask: What happens to the child if he is grouped homogeneously? There are many ways to answer, but each answer should reflect valid considerations. The instructional leader could provide information about the character of the groups after they have been assembled (this is the easiest answer); he could provide answers that reflect an appraisal of outcomes (what has happened to the learners in this grouping pattern?); and he could provide answers which reflect his and the school's system of values (what kind of intergrouping should occur if the learners are to work in a democratic setting?).

These types of questions lie within the framework of school functions. A more detailed look, then, at criteria on which grouping is based seems necessary if an effective and efficient instructional program is to emerge.

Most of the planning that deals with the instructional program in the area of "ability" grouping usually centers around the criterion of IQ or achievement.

Grouping by the criterion of IQ. This is the most common form of grouping used to establish homogeneous "ability" groups. Care should be taken by planners in using IQ as the sole criterion for grouping. Research indicates that ability predicts potential much better than it predicts achievement and grouping by IQ reduces achievement variability only slightly. Planners should realize that many students who achieve well are classified in the middle IQ range, and many students classified in the genius IQ range are poor achievers.

Grouping by achievement. Two principal bases exist for grouping by achievement. First, group the students by averaging the achievement scores (computed by compiling the results from all sections of an achievement test--arithmetic reasoning, arithmetic computation, word recognition, spelling, and so on). A student in the sixth grade might rate as an average achiever at the sixth grade level yet rate at the tenth grade in word recognition and the third grade in spelling. Such differences cannot be overcome by interclass grouping as the organization structure. Secondly, group the students according to their achievement in specific subjects.

If student enrollment is large enough in the specific subject, a given student might move during the day from a high section in algebra, to a middle section in social studies, to a low section in English. This grouping is predicated upon the fact that a given student has been pretested and judged as a high achiever in algebra, in the middle rank of students as an achiever in social studies, and a low achiever in English.

Self-contained classroom. The self-contained classroom is an organizational scheme, almost completely restricted to the elementary school, which groups a number of students and one teacher together for the day's learning activities. Such a scheme is predicated on the assumption that:

1. The total program can be better coordinated.
2. Closer teacher-learner relationships can exist.
3. Students can better identify with small groups that they know intimately.
4. Greater flexibility can exist in the daily program.

Any, all, or none of these assumptions may be true. Research indicates that the completely self-contained classroom is now third on the list of most commonly used organizational schemes (Nation's Schools 74:33 Dec. 1964). The present trend seems to be semi-self contained classes in which specialists assist the designated teacher. Music, physical education, and art teachers are, respectively, the most prevalent specialists.

Departmentalization. Departmentalization, long an organizational feature of the American secondary school, also exists at the elementary and intermediate levels. This means that students are grouped according to subject matter with a teacher who is a specialist in that particular subject. This organizational scheme is predicated on the assumptions that:

1. Pupils meet different teacher personalities supposedly better trained in their discipline areas than they would meet in a self-contained situation.
2. A more enriched instructional program can be offered.
3. More efficient instruction can be offered.
4. A better concentration of equipment can occur.
5. Pupils may be promoted by subjects instead of grades.

Interclass Grouping. Planning at this level of the horizontal structure centers on whether the total instructional program will consist of separate subjects, a combination of subjects, or a problem-solving arrangement that emphasizes the problem-solving situation and tends to ignore subject field designations.

The prevailing practice at the secondary level is a separate subject approach with some combination of subjects into broad fields, i.e. social studies. Thus, students are more or less grouped homogeneously and heterogeneously, according to the subject matter, in subjects, and combinations of subjects.

At the elementary level the prevailing practice as related to horizontal organization centers around self-containment or departmentalization. The curriculum of an elementary school is largely compartmentalized. Teachers teach subjects as separate blocks; whether they or the children move from room to room is the question. Moving students from room to room is platooning; the primary grouping issue, then, is whether to platoon or not to platoon.

The long-standing organizational design of our American schools is a teacher-per-class-per-grade at the elementary level and a teacher-per-class-per-subject-per-grade at the secondary school level. Modifications of these horizontal approaches are appearing; one modification of nationwide usage is cooperative teaching, or team teaching. This is an interclass grouping procedure with emphasis on teacher utilization. The two characteristics below describe team teaching:

1. An array of personnel must exist: team leader, master teacher, helping teacher, teacher and intern

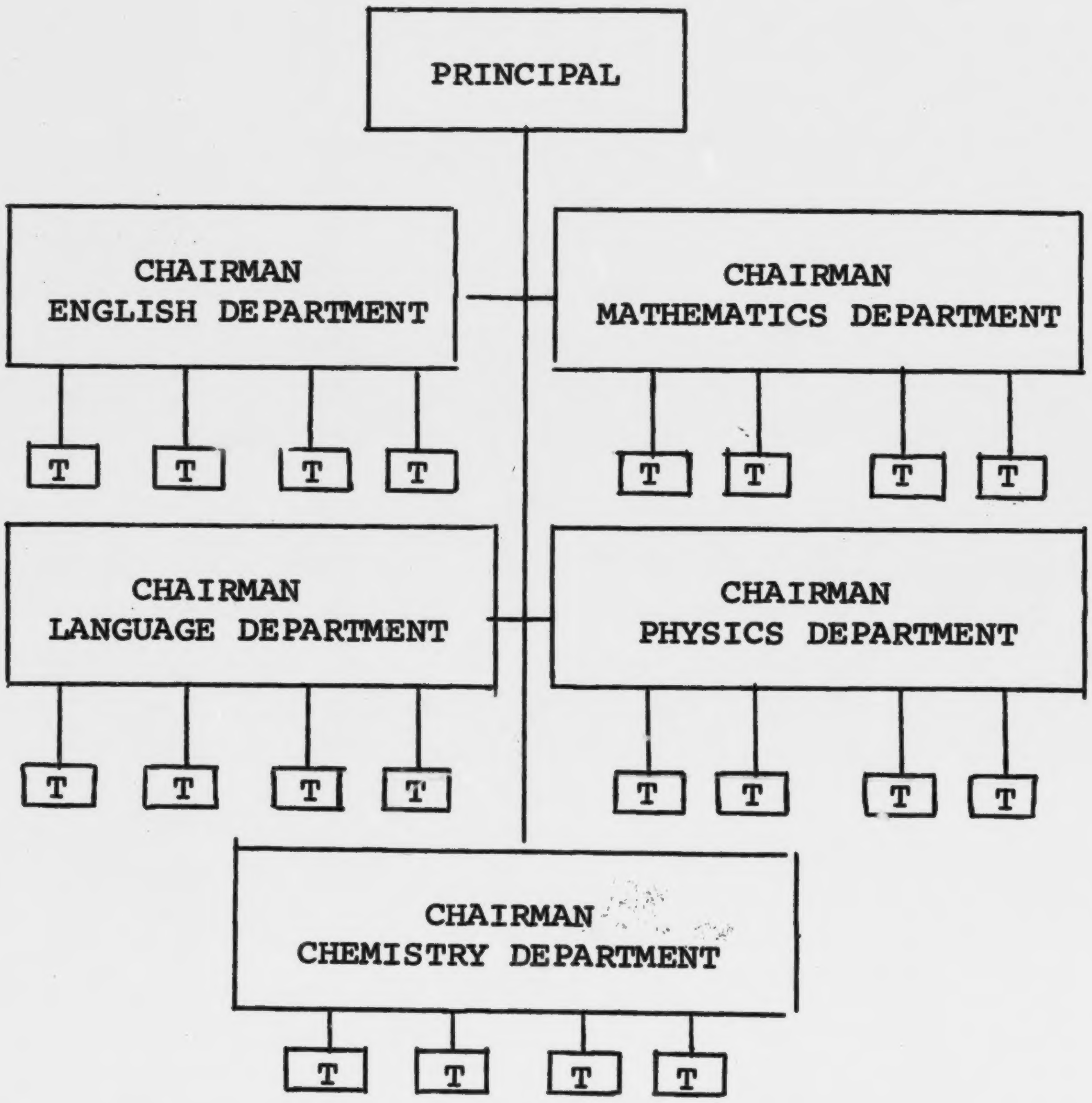
teacher, clerk. (Some other appropriate hierarchy may exist.)

2. Flexibility exists: ability to group as needed all students under supervision of the team.

Chart I illustrates a conventional plan for organizing personnel to work in the instructional program.

Chart I

CONVENTIONAL PLAN FOR PERSONNEL ORGANIZATION*


PRINCIPAL
CHAIRMAN ENGLISH DEPARTMENT
CHAIRMAN MATHEMATICS DEPARTMENT
T
CHAIRMAN LANGUAGE DEPARTMENT
CHAIRMAN PHYSICS DEPARTMENT
CHAIRMAN CHEMISTRY DEPARTMENT

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*Goodlad, John, School, Curriculum and Individual (Waltham, Mass.: Blaisdell Publishing Company, 1966).

Chart J illustrates a modification of Chart I showing interclass grouping but emphasizing teacher utilization. For a better understanding of team teaching, the reader might consult Trump's Focus on Change--Guide to Better Schools;[2] or Bush's A New Design for High School Education,[3] or Peterson's Effective Team Teaching.[4]

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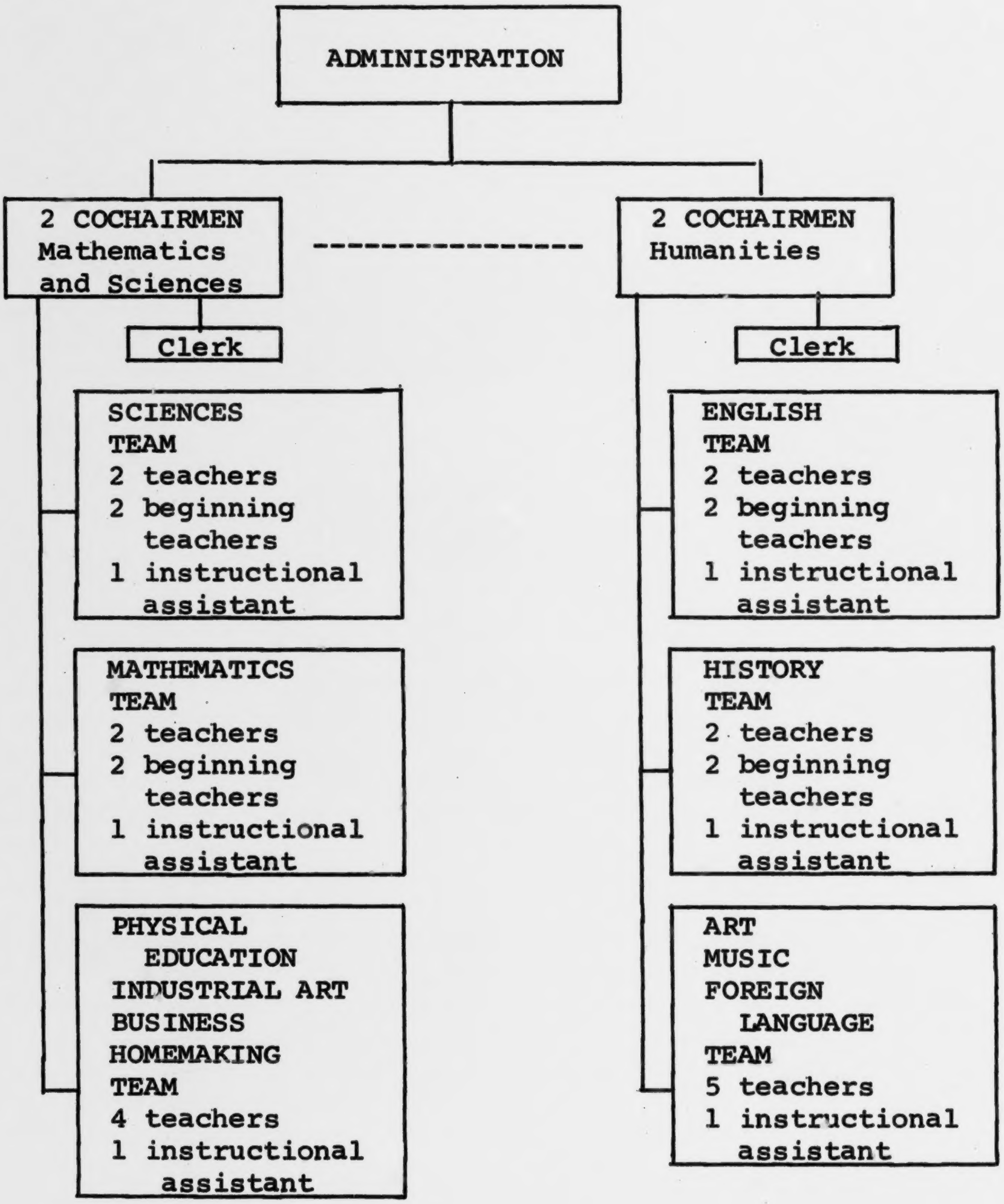
[2] Trump, J. Woyd and Dorsey Baynham, Focus on Change: Guide to Better Schools (Chicago: Rand McNally, 1961).

[3] Bush, Robert N. and R. W. Allen, A New Design for High School Education: Assuming a Flexible Schedule (New York: McGraw Hill Book Co., 1964).

[4] Peterson, Carl H., Effective Team Teaching: The Easton Area High School Program (New York: Prentice-Hall, Inc., 1966).

Chart J

A TEAM TEACHING PLAN OF PERSONNEL ORGANIZATION*


ADMINISTRATION
2 COCHAIRMEN Mathematics and Sciences
2 COCHAIRMEN Humanities
Clerk
Clerk
SCIENCES TEAM 2 teachers 2 beginning teachers 1 instructional assistant
MATHEMATICS TEAM 2 teachers 2 beginning teachers 1 instructional assistant
PHYSICAL EDUCATION INDUSTRIAL ART BUSINESS HOMEMAKING TEAM 4 teachers 1 instructional assistant
ENGLISH TEAM 2 teachers 2 beginning teachers 1 instructional assistant
HISTORY TEAM 2 teachers 2 beginning teachers 1 instructional assistant
ART MUSIC FOREIGN LANGUAGE TEAM 5 teachers 1 instructional assistant

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*Goodlad, John, School, Curriculum and Individual, (Waltham, Mass.: Blaisdell Publishing Company, 1966).

Program of Studies

The program of studies consists of the courses of instruction available to the pupils. Such courses are developed to provide for experiences which assist in meeting the common, as well as the individual, needs of the student. In most typical instructional programs, the required courses supposedly meet the common needs; the individual needs are met through the elective courses and the adapting of the content and instruction of required courses to the needs of individual students.

The program of studies is composed of curricula offerings which assist in bringing about desirable behavioral changes in students as they pursue each offering. All these educational experiences--required courses, elective courses, and related activities--when integrated and adapted to the educational needs of the students, should provide them with the ability to live in their future environment--our American democracy.

Planning a program of studies demands recognition on the part of the planner that a continuous process of improvement be considered in the program of studies in relation to the changing needs and interests of the students. The content of the program of studies should be planned, initiated, and implemented by the staff utilizing all available resources--professional and nonprofessional staff, students, the community, and other educational agencies. Any program of studies should be evaluated by the staff as needed to determine effectiveness and to bring about needed improvement.

Required Courses

The number and types of required courses for a school system are determined by legislative enactments, state boards of education, state departments of education, and/or the policies of the local school system itself.

Although these forces may dictate the number of required courses, the names of the courses, and the school grade in which these courses are taught, forces other than those named above may decide the content. The individual teacher, textbook writers, developers of study courses, and so on, have a voice in the content of each course.

Planning the instructional program necessitates a thorough understanding of those courses which are required by either internal or external agencies. If certain experiences are needed by a student to complete his education, care should be taken to determine if required course-work will meet that need. Table 5 depicts the required course by name and grade of five Southern states. The requiring agency is either the state department of education, the state board of education, or the state legislature.

Table 5

REQUIRED COURSES IN HIGH SCHOOL

Name of Course and Grade
Level Required by State

GRADE STATES	7	8	9	10	11	12	Number of Units req. by agency other than school.
* Ala.			English(1) Ala. History(½) Civics(½) Health & P.E.(1)	English (1) Health & P.E.(1)	English (1) Amer. History (1) Health & P.E. (1)	English (1) Amer. Gov.(½) Ec.(½) Health & P.E. (1)	13
** Ga.			Grades 9 - 12 English(3) Math(1) Science(1) Social Studies/one must be U.S. Hist.(3) Science or Math (1)				9
** S.C.			Grades 9 - 12 English(4) Social Studies/one must be U.S. History(3) Math(2) Natural Sci.(1) P.E.(1)				11
** Miss.			Grades 9 - 12 English(3) Miss.Hist.(½) Civics(½) Amer. Hist.(1) Amer. Gov.(½)				5½
*** Fla.	Grades 7 - 9 Lang. Arts(3) Math(2) P.E. (3) Sc.(2) Soc. Studies (2)			Grades 10 - 12 Lang. Arts(2) Math(1) Sc.(1) P.E.(1) Soc. Studies/one must be Amer. History(2)			19

* One unit of sc. and one unit of math. are required in Grades 9-12.

** Ga., S.C., and Miss. require the specified courses listed in Grades 9-12.

*** Fla. requires 12 specified courses in Grade 7-9 and 7 in Grades 10-12.

Elective Courses

In many instructional programs, the individual needs of students are met through their selection of courses which adds supplementary understanding, attitudes, ideals, knowledges, and skills to the basic required courses. Assisted by the guidance department, the administrative staff, or individual faculty members or by any one of the three, students select courses which will hopefully fulfill expressed desires and interests. If possible, students are given some type of interest test. This provides the school with information about the ability and interest of the students in given areas--vocational, abstract, mechanical, reading, and the like. The creation of elective courses to meet these expressed needs becomes a matter of planning.

Instructional Materials

For the past decade, an availability of a vast quantity of instructional materials has existed in this country. School systems, even those already financially overburdened, can secure through business and industrial organizations, public libraries, philanthropic organizations, and their state education agency a wealth of instructional materials for insignificant sums of money. The question many times is not cost but selection. Proper selection requires proper guidelines by which instructional materials may be chosen and used. Suggested guidelines for selecting instructional materials are:

1. Careful appraisal will determine if the materials are objective and accurate.
2. The materials should reflect the readiness level of the intended user.
3. The use of the materials should be carefully planned by the teacher: he should study before using, he should decide how they can be best used to reach teaching objectives, he should evaluate them.
4. The time spent in using any material should not exceed what is reasonable; time should be spent wisely.
5. The materials should interest the student.
6. Careful budgeting and wise spending should be the watchwords when selecting instructional materials.
7. The materials should not propagandize, unless that is the teaching objective.

Various types of instructional materials are discussed in the sections which follow. The instructional materials center is then discussed as the most appropriate site to house these materials.

Audio-Visual Materials

An increasing awareness of the importance of audio-visual instruction is a characteristic of modern schools. Audio-visual materials can be categorized many ways; for simplicity, according to Woods, the following dimensions are presented--three-dimensional, pictorial, graphic, and auditory.[5]

Three-dimensional materials. Three-dimensional materials can be purchased or made. Materials formed as objects, specimens, models, mock-ups, and cutaways are three-dimensional and can be simulated or real. Globes, costumed figures, replicas of important objects, and puppets are examples of simulated materials and may be constructed of wood, clay, plastic, and paper-mache. Stones, butterfly collections, and coin collections are examples of "real" materials.

Pictorial materials. Pictorial material presents a two-dimensional or visual likeness of the subject under consideration. The opaque projector, which can present printed pages of books or any nontransparent picture, is a useful aid. Filmstrips, with and without sound, slides, transparencies with an overhead projector, and sound motion-picture films are excellent pictorial materials. Sources of filmstrips, with or without sound, are the *Filmstrip Guide*, publishers, H. W. Wilson Co., New York, N.Y.; and the *Educators Guide to Free Slidefilms*, publishers, Educators Progress Service, Randolph, Wisconsin. These companies publish respectively *Educational Film Guide* and *Education Guide to Free Films* as sources of available motion pictures.

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[5] The High School Curriculum, ed. Karl R. Douglas (New York: Ronald Press, 1964).

Research indicates that more learning occurs through sight than through the other four senses. The Socony-Vacuum Oil Company studies found that learning through the five senses is distributed as follows: 1 percent, through taste; 1½ percent, touch; 3½ percent, smell; 11 percent, hearing; and 83 percent, sight. If these studies reflect any degree of authenticity, then schools should make a serious effort to secure an available supply of pictorial materials.

Graphic materials. Examples of graphic materials are graphs, diagrams, charts, maps, cartoons, flannelboards, and blackboards. These aids, which are really visual symbols, are more profitably used if constructed by the teacher and the students. Knowledge, understanding, and study skills are products of constructing and using these materials.

Auditory materials. The principal sources of auditory materials are the radio and recordings; disc recordings and magnetic tapes are relatively new. Possibly the largest users of auditory aids are teachers of social studies, language arts, and music. Discs and tape recordings are available free or on rental basis from many agencies. Publications that may assist teachers in selecting recordings are: Suggested Sources of Recordings for Educational Use, Office of Education, U. S. Department of Health, Education, and Welfare, Washington, D.C.; National Tape Recording Catalogue, Department of A-V Instruction, N.E.A., Washington, D.C.; and Educators Guide to Free Tapes, Scripts and Transcriptions, publishers, Educators Progress Service, Randolph, Wisconsin.

Instructional Television

By technical definitions, instructional television should be classified as an audio-visual aid; its potential as an instructional medium, however, suggests separate consideration. The constant shortage of teachers in every section of the United States plus a natural desire to improve learning contributed to both open- and closed-circuit television.

The educator who views instructional television as a tool, possessing certain advantages and disadvantages with effectiveness dependent upon the teacher and his use of the medium, will probably utilize this method of instruction effectively. Certain advantages seem evident:

1. It affords students the opportunity to see and hear.
2. It offers the talents of many teachers to many students.
3. It presents current events as they occur.

Certain disadvantages appear:

1. The possibility of immediate response by the student is lessened.
2. The school schedule must be adapted to a specific time.
3. Student progress must correspond with televised instruction through a course of study, thus lessening the opportunity to help the slow or fast learner.

Language Laboratories

Although language laboratories began in the mid-forties, they sprang into prominence in the sixties, primarily as a result of the passage of the National Defense Education Act. The present trend in the teaching of foreign languages emphasizes listening and speaking first, then reading and writing later. Although various designs exist throughout the United States, classifications should rest on how the student studies. There are three major versions of how he studies:

1. Listen - the student merely listens to a master recording.
2. Listen-Speak - the student listens, speaks, and can hear the playback of his voice.

3. Listen-Speak-Compare - in addition to listening, speaking, and playing back, the student can record the master voice and his own and compare the two.

Innumerable improvements will, of course, provide for more varieties in the future. Local systems should, if finances permit, install a language laboratory operated by a competent person whose qualifications must include skills in technical education. The system should bear in mind that a langauge laboratory is just another teaching tool; the teacher must relate the classroom and the laboratory in their proper perspective.

Printed Materials

Four types of printed materials are discussed below. A presentation of all printed materials that comprise a segment of the instructional program is, if by no other reason than lack of space, virtually impossible. These four major classifications include an example of most of the types of printed materials.

Textbooks and workbooks. The textbook is still the most widely used instructional material; in fact, for many teachers the textbook functions as the curriculum guide or the course of study. The following points should be noted about the textbook and the use of it:

1. Seldom should the textbook be used as the course of study (an up-to-date mathematics or science book might be exceptions to this rule).
2. It should serve as the basic resource for reference by students and teachers.
3. It should be relatively new. Modern technology has produced better illustrations, made books more aesthetic in appearance, and injected a higher quality in format and content, especially in mathematics and science.
4. More reliability may now be placed in content quality because of the participation of scholars of their academic disciplines in the authorship of textbooks. For example, the (SMSG) School Mathematics Study Group, composed of college professors of mathematics, specialists in teaching of mathematics, and classroom teachers, has prepared a number of excellent textbooks. Other study groups have prepared textbooks in their areas: The (PSSC) Physical Science Study Committee; the (BSCS) Biological Sciences Curriculum Study; the (CBA) Chemical Bond Approach, and so on.

How are textbooks selected in various states? Three approaches are used: two states follow the single-textbook adoption plan; approximately half the states allow the local district to select all the textbooks; and the remaining states allow the local systems to select from an adopted list of several approved textbooks for each course.

If a local system has the prerogative to select textbooks, it should formulate criteria to follow in evaluating those under consideration. The person or persons charged with the responsibility of selecting the textbooks should have available a rating card for comparison purposes. Form III is an example of this rating sheet.

Workbooks are an integral part of the instructional program at the elementary level; secondary teachers seem to prefer other supplementary aids. Workbooks are merely teaching tools; their contribution to the instructional program depends upon the quality of the workbook and its utilization by the teachers. Their virtue rests, in all probability, in providing an opportunity for the student with exceptional ability to proceed at his own rate and as drill for students who are deficient for any number of reasons.

Instructional Guides. Courses of study were a form of instructional guides which were used extensively by local school systems until the past decade. These instructional guides were usually developed under the tutelage of state department agencies, and they usually included course objectives, types of instructional activities that could be followed to implement those objectives, basic requirements, tests, the instructional materials needed, and time schedules.

In many states, courses of study adopted by state department agencies must be utilized by local education systems.

A curriculum guide is another form of instructional guide, is of recent vintage, and is usually constructed by the educational agency needing that particular aid. A committee of teachers under the direction of the curriculum supervisor usually develops the curriculum guides in a local system.

Characteristics of a good curriculum guide are:

1. The scope and sequence of the various courses within a given subject are covered.
2. Objectives for each course are presented.
3. Topical outlines are presented.
4. The objectives of the school or its philosophy is related to each subject field.
5. Instructional materials are listed.
6. Instructional activities are suggested.

Form III

RATING SHEET TO EVALUATE TEXTBOOKS

Book (Name, Title, or other identifying information)

Author	Publisher	Date

Grade or Subject area for which evaluated	Name of Evaluator

CRITERIA	RATING				
	Excellent	Good	Average	Poor	Undesirable
Indefinites					
1. SCHOLARSHIP					
A. Handling of data					
B. Awareness and coverage of new interpretations					
C. Selection of material					
D. Emphasis					
E. ______________					
______________					
2. ORGANIZATION					
A. Covered sequence and development adequately					
B. Maintained chronological balance					
C. Continuity exists between chapters					
D. Developed political, economic, and cultural factors.					
E. ______________					
______________					

CRITERIA	RATING				
	Excellent	Good	Average	Poor	Undesirable
3. TEACHING AIDS					
A. Quality and type of exercises, questions, activities					
B. Exercises, questions and activities related to:					
1. text					
2. aims of text					
3. goals of teacher					
C. Quality of illustrations and maps					
D. Illustrations related to text and teacher aims					
E. Referred to other materials such as visual aids, library, and the like.					
F. ____________________ ____________________					
4. PHILOSOPHY					
A. Philosophy of author					
B. Philosophy of book clearly stated					
C. Philosophy is acceptable to teachers who will use it					
D. Philosophy is acceptable to community					
E. Prejudice is acknowledged					
F. ____________________ ____________________					

CRITERIA	RATING				
	Excellent	Good	Average	Poor	Undesirable
5. STYLE					
A. Vocabulary is understandable at level to be used.					
B. Concepts are covered					
C. The proportion of generalizations to specific examples is acceptable					
D. Technical terms are explained					
E. Illustrations increase interest					
6. SPECIFIED ANSWERS					
A. Give number of units, ____; chapters, ____; pages, ____.					
B. Give cost of book _____.					
C. Give type size _____; type face, ______________.					
D. Are pages numbered?					
E. Is there a preface?					
F. Is there an introduction?					
G. Is there a table of contents?					
H. Is there a list of maps?					
I. Is there a list of illustrations?					
J. Is there an index?					
K. Are there materials in the appendix?					
L. Is there a teachers' manual?					
M. Is there a workbook for the students ?					
N. ________________________					

Note: Only those items, which apply to the particular textbook being evaluated, in sections 1-5, should be checked. All questions in section six should be answered.

The final printing and adoption of the curriculum guide as an integral part of the instructional program should occur only after a trial period.

Current Materials. Current reading materials are types of instructional aids used extensively as supplementary information. Newspapers, popular magazines, and professional journals are examples of paper materials.

Newspapers:

Newspapers can be an invaluable teaching aid. Since a large portion of the nonschool society reads little except the newspaper, schools must endeavor to study and use the newspaper as an instructional aid.

Popular Magazines and Professional Journals

Popular magazines serve as references for teachers and students, as a source of enjoyment, and as illustrative aids in building resource files.

Professional journals are a prime source for teachers to learn about new developments in education in general and their discipline area in particular. A professional journal of some description is available in any teaching field.

Free materials. The inclusion of this section is purposeful; teachers should not be able to justify inferior teaching because of a scarcity of instruction materials when an abundancy of free materials exists.

Why don't more teachers use free materials? Two reasons seem evident: (1) a lack of knowledge as to acquisitional source, and (2) selection procedures in procuring the materials.

Bibliographies of free materials are available. The Educators Index to Free Materials, pub., Educators Progress Service, Randolph, Wisconsin; Vertical Free Index, pub., H. H. Wilson Co., New York.; Sources of Free and Inexpensive Educational Materials, pub., Field Enterprises Educational Corporation, Chicago, Ill.; and Free and Inexpensive Learning Materials, pub., Peabody College, Division of Surveys and Field Services, Nashville, Tenn., are excellent bibliographies that teachers might utilize to locate needed, free materials.

Selection procedures in securing free materials differ from school to school. Some schools permit individual teacher selection without supervision, some use screening committees to judge the educational value of the materials, some have no selection policy. One important selection criterion should be observed regardless of the procedure used: materials containing excessive advertisement should not be used.

Programmed instruction. Another type of instructional material available in almost all subject and grade level areas is descriptively entitled "programmed." These materials, unlike television or motion pictures, are designed to individualize the teaching process. The subject matter, divided into logical steps, with each step consisting of a stimulus, a response, and an affirmation or correction, gives the student an opportunity to answer the question or problem and compare his response with the supplied correct answer.

Whether teaching machines are used or not, programmed instruction allows:

1. The student to proceed at a rate that he sets, thus creating a form of independent study.
2. The student an opportunity to master certain types of materials faster than traditional methods.
3. An immediate yes or no to be supplied to the question asked or the problem raised, thus increasing his motivation to pursue the subject further.
4. Free time to the teacher, which enables him to assist each student more often and more effectively.

Two major methods are used in preparing programmed materials--the linear and branch methods. The linear method, advocated by B. F. Skinner, utilizes the construct-response steps that require the responder to supply his answer to the stimulus. The branch method, advocated by N. A. Crowder, utilizes the selected-response or multiple-choice steps that allow the responder to correct his deficiency before he can proceed.

Programmed instruction has two basic limitations:

1. A poor or nonreader is not able to use these materials effectively.
2. It does not assist the student in acquiring certain types of skills necessary in developing his personality.

Instructional Materials Center

If instructional materials are to reach the consumer at the appropriate time, procedures for acquiring, storing, and distributing must exist. The creation of an instructional-materials center (broadening the concept of the library) is suggested. Here, in addition to printed matter, all types of instructional aids--films, filmstrips, models, tapes, recordings, and the like,--are cataloged, and stored for use. Of vital importance is that a central coordinating agency exists, not that all materials are stored collectively. The center serves as a place for teachers and pupils to plan and develop new materials and evaluate existing ones for use.

If finances and personnel are limited, systems might establish a systemwide center under the supervision of a director of instructional materials, who would coordinate activities for the entire system. Each school could then appoint a coordinator of instructional materials to work closely with the director to insure that the right material reaches the right teacher at the right time.

Extracurricular Activities

Learning experiences occur outside formally organized class situations. The term extracurricular activities, as traditionally accepted, includes those learning experiences, carrying no credit toward graduation, in which students are voluntarily engaged under the control of the school. Recent trends suggest that credit is now being given for many of these extracurricular activities, especially physical education activities. These activities, in the modern school setting, are part of the total instructional program and the school staff should accept the responsibility for seeing that the tremendous potential of these activities is used to attain the educational goals of the school.

The major function of an extracurricular activities program is to provide opportunities for students to learn and practice personal-social understandings and skills, to acquire leadership experiences, and to build desirable attitudes toward school and life.

Controversy about the extracurricular program, which includes those events that attract public attention and those that the public seldom sees, centers around the question of emphasis on any activity. The number of activities sponsored by the school is irrelevant as long as the number is manageable; the controversy arises over the amount of time a student spends in participation.

A careful look at the extracurricular program is a necessity; an administrator should list the activities at his school and with his staff determine the merit of each on the basis of its contribution to the total school program. Form IV can serve as a model to list extracurricular activities; in addition, proposed extracurricular activities can be evaluated and the notation of acceptance or rejection recorded.

Form IV

EXTRACURRICULAR ACTIVITIES
(A LISTING AND RATING CHART)

Type of Activity	Operative	Proposed	Rejected	Elem. or Sec.	Criteria to Evaluate Activity
Student Council					
School Assemblies					
Homeroom					
Clubs:					
Language					
Spanish					
French					
Latin					
German					
Other______________					
Mathematics					
Science					
Physical Education					
History					
Hobby________________					
Boys' Glee					
Girls' Glee					
Future Farmers America					
Other________________					
Other________________					
National Honor Society					
National Junior Honor Society					
Chorus					
Orchestra					
Band					
Debating					
Dramatics					
Publications					
Newspaper					
Annual					
Handbook					

Type of Activity	Operative	Proposed	Rejected	Elem. or Sec.	Criteria to Evaluate Activity
Athletics					
Intramural					
Interscholastic					
Football					
Basketball					
Baseball					
Track and Field					
Swimming					
Tennis					
Golf					
Wrestling					
Other______________					
Other______________					
Other______________					

Note: Column one is a count. Column two is to determine those activities proposed for inclusion in the school program. Column three is for the activities proposed and rejected by committee action. Column four: write in E (for elementary) and S (for secondary). Column five lists criteria for evaluating activity.

QUESTIONNAIRE
Sample on Instructional Needs

A. Elementary
  1. General
    a. Has a statement of goals for the elementary school been developed? _____yes _____no

    b. Have these goals been defined? _____yes _____no

    c. Is the curriculum design for the elementary school consistent with these goals? _____yes _____no

    d. Have procedures been developed that provide for a continuous review and upgrading of the instruction?
    _____yes _____no
    Is copy available? _____yes _____no

    e. Have procedures been developed that will provide for review, evaluation, and selection of instructional materials? _____yes _____no

    f. Are the classroom teachers given the opportunity for making curricular decisions at the instructional level?
    _____yes _____no Explain.

    g. Does the curricular organization provide for planning both scope and sequence of subject matter?
    _____yes _____no

  2. Organization
    a. How are elementary schools organized? ___nongraded ___departmentalized ___self-contained ___other. What grades are included?___

    b. In what content areas is instruction given? ___reading ___arithmetic ___writing ___science ___health ___physical education ___history ___art ___music ___spelling ___geography ___foreign languages ___, ___, ___others.

    c. How long is the elementary school day? _____hours.
    _______number of days in school year.

    d. Net time available per day exclusive of recess and lunch:
    _____hours _____minutes.

    e. What does the school do in orienting and admitting transfer students? (Describe)

f. What does the school do in orienting and admitting beginners (first graders)? Describe.

3. Schedule
   a. How much time daily is available for instruction? ___hours

   b. Please indicate below the minutes devoted weekly to the content areas in each grade.

	Reading	Arithmetic	Writing	Science	Health	Physical Education
Grade 1						
2						
3						
4						
5						
6						
7						
8						

	History	Art	Music	Spelling	Georgaphy	Foreign Language
Grade 1						
2						
3						
4						
5						
6						
7						
8						

4. Instructional Materials

a. Provide the following information on textbooks used in the elementary school.

GRADE 1

	Author (last name)	Name of book/series	Name of publisher	editor (year)
Reading/Readiness				
Science/Readiness				
Writing/Readiness				
Arith./Readiness				
Health & P.E.				
Art				
History				
Music				
F. Language				
Other				

GRADE 2

	Author (last name)	Name of book/series	Name of publisher	edition (year)
Reading/Readiness				
Science/Readiness				
Writing/Readiness				
Arith./Readiness				
Health & P.E.				
Art				
History				
Music				
F. Languages				
Other				
Other				
Other				

GRADE 3

	Author (last name)	Name of book/series	Name of publisher	edition (year)
Reading/Readiness				
Science/Readiness				
Writing/Readiness				
Health & P.E.				
Art				
History				
Music				
F. Languages				
Other				
Other				
Other				

GRADE 4

	Author (last name)	Name of book/series	Name of publisher	edition (year)
Reading				
Science				
Writing				
Arithmetic				
Health & P.E.				
Art				
History				
Music				
F. Languages				
Other				
Other				
Other				

GRADE 5

	Author (last name)	Name of book/series	Name of publisher	edition (year)
Reading				
Science				
Writing				
Arithmetic				
Health & P.E.				
Art				
History				
Music				
F. Languages				
Other				
Other				
Other				

GRADE 6

	Author (last name)	Name of book/series	Name of publisher	edition (year)
Reading				
Science				
Writing				
Arithmetic				
Health & P.E.				
Art				
History				
Music				
F. Languages				
Other				
Other				
Other				

GRADE 7

	Author (last name)	Name of book/series	Name of publisher	edition (year)
Reading				
Science				
Writing				
Arithmetic				
Health & P.E.				
Art				
History				
Music				
F. Languages				
Other				
Other				
Other				

GRADE 8

	Author (last name)	Name of book/series	Name of publisher	edition (year)
Reading				
Science				
Writing				
Arithmetic				
Health & P.E.				
Art				
History				
Music				
F. Languages				
Other				
Other				
Other				

b. What other instructional materials (not equipment and supplies) are provided in:

Grade 1 (list)

Grade 2 (list)

Grade 3 (list)

Grade 4 (list)

Grade 5 (list)

Grade 6 (list)

Grade 7 (list)

Grade 8 (list)

c. Are paperback books acceptable? _____yes _____no. In what content areas? ______________________________
____
____

d. What instructional equipment is used in the elementary school?

____ overhead projector
____ filmstrip projector
____ movie projector
____ charts
____ maps
____ globes
____ Laboratory mobile____ fixed_____
____ ETV
____ bioscope
____ microscope
____ models
____ abacus
____ number lines
____ other

e. Do the elementary schools have a testing program? ___yes ___no

1) If so, what content areas are tested?
____
____
____
____

2) List the tests used - by grade:

Grade 1 ________________ Grade 5 ________________
Grade 2 ________________ Grade 6 ________________
Grade 3 ________________ Grade 7 ________________
Grade 4 ________________ Grade 8 ________________

Other ________________

3) How is the test information used? ________________
____
____
____

5. Instructional Materials Center (Library)

   a. Does each school center have adequate space for the instructional Materials Center (IMC)? _____yes _____no

   b. Is the IMC an integrated part of the school's educational activities? _____yes _____no. Explain.

   c. Is a professional person available on a full-time basis for coordinating and developing maximum use by teachers and pupils of the IMC? _____yes _____no.

   d. What materials and equipment are available?

      1) Materials:
         supplementary readers____
         dictionaries ____
         encyclopedia ____
         other reference books ____
         filmstrips ____
         slides ____
         records ____
         art reproductions____
         other ____

      2) Equipment:
         film projectors ____
         16 mm projectors ____
         portable t.v. ____
         tape recorders ____
         transparencies ____
         others ____

B. High School

   1. General

      a. Has a written statement of philosophy been developed for the high school? _____yes _____no Is it available? _____yes _____no

      b. Describe briefly how and by whom this philosophy was developed.

      c. Are the objectives consistent with the goals as stated in the philosophy? _____yes _____no

      d. Is the instructional program of the high school designed so that it can satisfactorily achieve the stated objectives? _____yes _____no Explain.

      e. Are the objectives stated behaviorally and in terms that can be measured? _____yes _____no

      f. What would hamper the implementation of these objectives?

2. Organization
   a. Circle the grades that are provided for at this school center. 8 - 9 - 10 - 11 - 12

   b. Length of class periods
      __________minutes
      __________number of periods
      __________number of days school is in session

   c. Number of professional staff members _________; number of nonprofessional employees __________

   d. Enrollments by grades according to latest report:
      8_________
      9_________
      10________
      11________
      12________

   e. Largest daily teaching load of any teacher ___________ smallest daily load of any teacher __________.

   f. Number of units required for graduation __________.

   g. Is the school accredited by the Southern Association of Secondary School and colleges? _____yes _____no _____other

3. Offerings
   a. Attach copy of:
      1. Program of Studies
      2. Schedule

   b. Do the course offerings enable the school to implement the objectives? _____yes _____no
      If no, explain.

   c. Are the course offerings sequentially organized?
      _____yes _____no

   d. Do the course offerings provide for students at different ability levels and with different needs?
      _____yes _____no How?

4. Extracurricular Activities
Supply the following information.

Name of Activity	Purpose	Sponsor	Number of Students

5. Instructional Materials Center (Library)
   a. Does each school center have adequate space for the Instructional Materials Center (IMC)? ___yes ___no

   b. Is the IMC an integrated part of the school's educational activities? ____yes ____no Explain.

   Number volumes in IMC_________

   c. Is a professional person available on a full-time basis for coordinating and developing maximum use by teachers and pupils of the IMC? ____yes ____no

   d. What materials and equipment are available?

   (1) Materials:
   supplementary readers ___
   dictionaries ____
   encyclopedia ____
   other reference books ___
   filmstrips ____
   slides ____
   records ____
   art reproductions ____
   others ____

   (2) Equipment:
   film projectors ___
   16 mm projectors ___
   portable t.v.____
   tape recorders ____
   transparencies ____
   others ____

   e. Textbooks - attach copy of textbook inventory.

ENROLLMENTS

____
(School System)

SCHOOL____________________________________ ACTIVE ENROLLMENT AS OF LAST REPORT__________

	Grade	1	2	3	4	5	6	7	TOTAL	8	9	10	11	12	TOTAL	TOTAL
									1 - 7						8 -12	1-12
	White															
	Black															
	White															
	Black															
	White															
	Black															
outs prev.yr.	White															
	Black															
	White															
	Black															

SCHOOL DROPOUT SUMMARY

(Count as dropout according to state regulations)

Age Grade	6 Yrs.	7 Yrs.	8 Yrs.	9 Yrs.	10 Yrs.	11 Yrs.	12 Yrs.	13 Yrs.	14 Yrs.	15 Yrs.	16 Yrs.	17 Yrs.	18 Yrs.
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													
TOTAL													

CHAPTER IV

INSTRUCTIONAL PERSONNEL

Many factors contribute to quality education, including: adequate financial support, efficient central administration, well-designed instructional space, broad curriculum, and a sufficient supply of instructional materials and equipment. However, these factors merely set the stage for educational opportunities. The factors that largely determine the quality of the instructional program are the adequacy, skill, and dedication of the professional and nonprofessional staff at the local school level.

Professional personnel may be defined as those people who have academic training at an institution of higher education, and are certified by the state education agency as competent to perform specified teaching and administration tasks. Nonprofessional personnel are usually defined as those people who are not certified by a state or regional accrediting agency to teach--secretaries, teacher aides, cafeterial employees, custodians, and the like.

Professional Personnel

The School Principal

The principal holds a key administrative position in the public schools in the United States. As the "middle-man" posed between central administration and the staff, he must put into operation the policies of the school system, execute the decisions made by the superintendent which pertain to his school, and, at the same time, meet the personal and professional needs of his teachers.

Basically the principal's role demands interactions with the superintendent, the superintendent's staff, assistant principals, teachers, the students, and community groups and individuals.

The functions of the principal, according to Langlits, include these delegated responsibilities:

1. Accounting of pupils, census, and attendance
2. Arranging for substitute teachers
3. Assisting teachers in diagnosing learning difficulties of pupils
4. Controlling pupil behavior
5. Coordinating audio-visual activities
6. Determining specifications for supplies and equipment
7. Developing pupil reporting procedures
8. Directing and coordinating the inservice training program
9. Directing and supervising the pupil activity program
10. Directing the guidance program
11. Directing the health and safety program
12. Directing the program for exceptional children

13. Distributing supplies and equipment
14. Helping teachers in planning effective remedial instruction
15. Inducting and orienting nonprofessional staff personnel
16. Inducting and orienting professional staff personnel
17. Inventorying supplies and equipment
18. Maintaining pupil personnel records
19. Scheduling professional and nonprofessional staff personnel
20. Scheduling pupils
21. Supervising and auditing internal accounts
22. Supervising nonprofessional staff personnel
23. Supervising professional staff personnel.[1]

The size of the school system and the size of the school center determine, to a large degree, whether the person acting as the head of that center is a principal or a teacher performing some of the functions listed above which are normally assigned to a principal. In general, state codes throughout the United States fail to define in exact terms what is a principal.

The organizational structure in each system affects the number of principals needed. If a school center has a K-12 organizational pattern, a principal could be in charge of the total structure with an assistant teaching principal in charge of the elementary division. If the enrollment warranted and even though the elementary and secondary buildings adjoined each other, separate principals could be in charge of each building. If the system operates under a 6-3-3 organizational pattern, fewer principals would be needed than for a 3-3-3-3 pattern.

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[1] Linglits, Harold N., "A Study of the Allocation of Administrative Functions between the Chief School Administrator and the Secondary School Principal in Selected Schools in N. Y. 37" (Doctoral Dissertation, Syracuse University, 1958).

Another method of determining functions and number of personnel needed is to review and analyze the accreditation standards for elementary and high schools issued by the state education agency. This applies to those systems whose schools are accredited; if not accredited, the standards still serve as guidelines against which to measure.

The possibility of saying with exactness that each person who is the titular head of a school center is a principal rests upon the school system's definition of his role, upon state regulation, upon legal enactments, upon accrediting associations, and, above all, upon the operational policy of the system.

The number of principals, then, becomes a matter for the local school system. A commonly accepted definition of a principal is that more than one-half of his school day is spent in an administrative role. If this definition is accepted, then counting the number of principals in any school system becomes a matter of defining functions, recordings, and totaling. In addition to the state registry for teachers which carries the total number of personnel employed in the system, other counting techniques could be developed. Form V suggests one method of determining the functions of personnel charged with administrative responsibilities, allotting them to their respective school centers, and totaling the number classified as principals.

The Teachers

The number of teachers, like the number of principals, can be secured from the state education agencies' yearly reports. In addition, each school center maintains a teacher registry, which could serve as an instrument for counting the number of teachers in each system. For obvious reasons, their reports are sometimes erroneous and often late. Because information concerning the number of teachers employed in a school system could be needed at any moment for many and various reasons, records should be updated constantly. In addition, planners in all phases of the educational program constantly need information about the number of teachers functioning in specific discipline areas. Form VI suggests that teachers should be listed in the discipline area in which they teach and, simultaneously, placed in their respective school center.

Form V
DETERMINATION OF PRINCIPALS
(MODEL)

School Center by Name	Nonteaching Adm. Head	Nonteaching Adm. Asst. (Assistant Principal)	Teaching Adm. Head, Adm. Role More Than Half Time	Teaching Adm. Head, Teaches More Than Half Time	Head Teacher Title-Teacher Full Time
School Center 1 1,100 students Grades 7-12	J. Smith (1)	P. Jones (1)			
School Center 2 631 students Grades K-6	R. White (1)*				
School Center 3 121 students Grades K-6				M. Brown (1)	
School Center 4 1,310 students Grades 10-12	R. Bill (1)	B. James (1)	F. Lloyd (1)		
School Center 5 921 students Grades 7-9	J. Jack (1)	R. Love (1)			
School Center 6 1,321 students Grades K-6	T. Tome (1)	F. Floyd (1)	R. Green (1)		
School Center 7 520 students Grades K-6	J. Lemay (1)			L. Taylor (1)	
School Center 8 621 students Grades K-6	B. Bones (1)		J. Jordan (1)		
School Center 9 211 students Grades K-8	J. Johnson (1)*				
School Center 10 110 students Grades 1-6					M. Mays (1)
TOTAL	8	4	3	2	1

* Serves as principal of school center two and three

** Serves as principal of school center nine and ten

Note: According to an acceptable definition of a principal used previously, there are 15 principals in this school system.

Form VI

NUMBER OF TEACHERS IN SYSTEM
SECONDARY: 7-12
(MODEL)

School Center by Name	English	Social Studies	Math.	Science	Business	Journa-lism	Foreign Language	Home Making	Music	Physical Education	Art	Ind. Arts	Vocal	Guidance	Library	LOCAL OPTIONS						
School 1	6	6	5	5	4	1	2	2	2½	3	1½	3	1½	2	2½							
School 2																						
School 3																						
School 4	8	7	5	5	4	1½	2½	2	2½	3	1½	3	2	3	3							
School 5	5	5	4	3	0	0	1	3	3	2	1	0	1	2	1							
School 6																						
School 7																						
School 8																						
School 9																1*						
School 10																						
TOTAL	19	18	14	13	8	2½	5½	7	8	8	4	6	4½	7	6½	1*						

Professional
Staff-Teachers

Note: *This teacher is a roving librarian.
This request can be updated each time a teacher turnover occurs.

Form VI

ELEMENTARY: K-6 or 8

School Center by Name	K. G.	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8	VARIATIONS OF DEPARTMENTALIZED OR OTHER PLANS												
School 1																						
School 2	1	4	4	4	3	3	2															
School 3	¼	¼	½	½	½	½	½															
School 4																						
School 5																						
School 6	4	7	7	7	7	6	6															
School 7	1	3	3	3	3	2	2															
School 8	1	4	4	3	3	3	2															
School 9	2	4	4	4	4	3	3															
School 10		½	½	½	½	½	½															
TOTAL	9¼	22 3/4	23	22	21	18	16															

Professional
Staff-Teachers

Nonprofessional Personnel

The types and number of nonprofessionals differ from school system to school system and from school center to school center in relation to the needs of the local education system.

Secretaries

Little or no legal enactments specify the number, roles, or functions of secretaries in a school system. Authorization for secretarial services is usually a direct result of policy of the board of education; secondary school centers and central administrative staff are more likely to have secretaries than elementary schools. A simple rule of thumb suggests a secretary for each principal where the enrollment is around or over 500 children. Care should be exercised in counting secretaries; they are not to be confused with people functioning as clerks. A secretary can be defined as a person trained in areas of business, socially competent, with authority directly delegated from the principal. A clerk performs routine typing-filing activities and usually receives her orders from the secretary or the person for whom she works. In addition, students perform clerical and secretarial tasks as part of their educational experience and they are not secretaries. Form VII, a supplement to Form VI, suggests a procedure for listing, recording, and totaling the number of secretaries in a local school system.

Teacher Aides

No legal definition of teacher aides exists; however, descriptions of their functions occur frequently in the literature. A teacher aide is a person, with or without prior college training and with or without prior educational experience, who assists the classroom teacher in the performance of his duties. This assistance could include grading papers, taking roll, listening to stories, assuming clerical duties of the teacher, and the like. The underlying reason for using teacher aides is to free the teacher from nonteaching tasks so that he may devote that freed time to teaching. Although most teacher aides are paid a certain sum for each hour's work, many schools utilize voluntary teacher aides who are usually parents and who receive no pay. Teacher aides may work full- or part-time; one teacher aide should equal one day's work. Form VII suggests a procedure for listing, allocating, and totaling the number of teacher aides in a local school system.

Custodians

The custodial staff at any school center depends in number upon the size of the buildings which comprise the school center and upon the financial ability of the school system to support the custodial services. Female custodians perform light janitorial work such as dusting, care of rooms, cleaning of chalk boards, and caring for girls' toilets; male custodians perform most of the janitorial services at a school center. Custodians may work full- or part-time; one custodian should equal one day's work. If his job is not equated to time, then one custodian should equal certain specified tasks. Form VII suggests a procedure for listing, allocating and totaling the number of custodians in a local school system.

Cafeteria Employees

Cafeteria employees, like secretaries, teacher aides, and custodians, are nonprofessional employees of a school system and, as such, are supervised by the principal of any school center which has a cafeteria. While a system might employ a director of cafeterias and if satellite feeding prevails might employ drivers and dispersers, the common concept of a cafeteria located in each school center is to have cooks and servers perform all tasks related to the feeding of students. Cafeteria employees may work full- or part-time; one employee, however, should equal one day's work. Form VII suggests a procedure for listing, allocating, and totaling the number of cafeteria employees in a local school system.

Form VII
LISTING OF NONPROFESSIONAL PERSONNEL

School Center By Name	Secre-taries	Clerks		Teacher Aides		Custodians		Cafeteria Employees		
		Paid	Student	Paid	Voluntary	Male	Female	Cooks	Servers	Others
Central Office Areas	3	3				1				
School Center 1	2	3	5	10	7	5	1	5	5	1[1]
School Center 2	1	1	1½	0	0	1	1	0[2]	0	0
School Center 3	0	½	1	0	0	0[3]	0	0[3]	0	0
School Center 4	2	3½	10	20	10	7	4	5	5	0
School Center 5	1½	2½	2	7	10	2	0	3	3	0
School Center 6	2	2	0	0	10	4	3	5	5	0
School Center 7	0	1	0	0	0	0[4]	0	0[4]	0	0
School Center 8	1	2	0	0	0	1	0	3	2	0
School Center 9	1	3	0	0	0	2	1	0[5]	0	0
School Center 10	0	0	0	0	0	0[6]	0	0[6]	0	0

1. This dietician is assigned to School Center 1, but prepares the menu for the entire system.
2. The children eat at School Center 1.
3. The custodians at School Center 1 care for School Center 3; the children eat at School Center 1.
4. The children at School Center 7 eat at School Center 5; custodial services are provided by School Center 6.
5. The children at School Center 9 eat at School Center 6.
6. Custodial Services are furnished by School Center 6; the children eat at School Center 6.

Sample Questionnaire on Personnel

A. Staff personnel policies
   1. Developed by whom? ________________________________
   2. Are policies written? ____yes ____no. Does each staff member have a copy? ____yes ____no
   3. Are job descriptions available for each position? ____yes ____no
      a. Are qualifications identified? ____yes ____no
      b. Are organizational relationships identified? ____yes ____no
      c. Are responsibilities clearly stated? ____yes ____no
      d. Are job descriptions available for each position? ____yes ____no

B. Recruitment
   1. Is recruitment a continuous process? ____yes ____no
   2. Are budget provisions made for informational brochures and travel of recruiters? ____yes ____no
   3. Is staff kept informed of vacancies? ____yes ____no
   4. Are qualifications and requirements for each opening sent to placement offices and applicants? ____yes ____no

C. Selection
   1. Do selection criteria make for staff balance in age? ____yes ____no
   2. Do criteria apply to both teaching and administrative staff? ____yes ____no
   3. Are systematic appraisal procedures followed, i.e. review of application, checking personal and professional credentials, personal interview with more than one person for a position? ____yes ____no

D. Employment
   Does each staff member annually receive a written contract which specifies
   1. his assignments? ____yes ____no
   2. salary? ____yes ____no
   3. number of days on duty? ____yes ____no
   4. other?__________________________. ____yes ____no

E. Orientation

1. Is orientation a year long process with input from board of education, administrative, and professional staff? ____yes ____no
2. Do individual schools assume a major role in orientation? ____yes ____no
3. Does the community contribute to orientation? ____yes ____no
4. Do participants provide evaluations for orientation program? ____yes ____no

F. Assignment

1. Are beginning teachers given special consideration in placement? ____yes ____no
2. Is special supervisory and consultative assistance provided for them? ____yes ____no
3. Is a probationary period a part of the placement process? ____yes ____no

G. Transfer

1. Are staff members' desires considered along with needs of the educational program in making transfers? ____yes ____no
2. Are staff members consulted when transfers are effected? ____yes ____no
3. Are explanations provided when transfers are made or transfer requests are not granted? ____yes ____no

H. Promotion

1. Are vacancies publicized among the staff first? ____yes ____no
2. Is promotion based on merit? ____yes ____no
3. Does a training program operate to develop outstanding candidates within the school system? ____yes ____no

I. Evaluation

1. Is evaluation conducted jointly with the employee being evaluated? ____yes ____no
2. Are staff attitude surveys conducted periodically to detect and remove sources of staff dissatisfaction? ____yes ____no

J. Leaves

1. Sick leave is provided in the amount of how many days annually? ______
2. Sick leave accumulates to a maximum of how many days? ______
3. May sick leave be used when employee's immediate family requires his presence? ____yes ____no
4. Is leave provided for personal reasons for three days annually for a death in the family; children's graduation from school; religious observances; court summonses; other justifiable reasons? ____yes ____no
5. Is two days' leave provided for attendance at professional activities? ____yes ____no
6. Is sabbatical leave provided for study or educational travel at half salary for a full academic year? ____yes ____no
7. Is extended leave without salary granted for purposes such as maternity, military service, exchange teaching, holding political offices, related association or governmental service and professional studies? ____yes ____no
8. Are policies concerning conditions of return to service carefully delineated? ____yes ____no

K. Medical examination

1. Is medical examination, including chest x-ray, required upon initial employment? ____yes ____no
2. Are examinations required annually thereafter with reports to be furnished the school system? ____yes ____no

L. Dismissal

1. Does dismissal occur only after:
   a. written notification of intent to dismiss when effective date has been specified? ____yes ____no
   b. efforts have been made to assist the employee to improve? ____yes ____no
2. Is dismissal based on documentary evidence? ___yes ___no
3. Is provision made for dismissed employees to have their appeals heard by impartial bodies? ____yes ____no
4. Do dismissal procedures provide that a written statement of charges be provided the employee? ____yes ____no
5. Do dismissal procedures require judgment by staff member's peers as well as school authorities? ____yes ____no

M. Retirement
Is full information provided all employees on retirement procedures? ____yes ____no

N. Salary schedule
1. Are salary schedules written and copies furnished each professional employee? ____yes ____no
2. Does the salary schedule make no distinction on the basis of grade level or subject taught? ____yes ____no
3. Does the salary schedule provide for:
   a. 100 percent increase at the master's degree maximum over the bachelor's degree minimum? ____yes ____no
   b. no more than 11 annual increments to reach the maximum salary at either the bachelor's or master's degree level? ____yes ____no
   c. the amounts of the annual increments in each preparation level to average at least 80 percent of the bachelor's degree minimum? ____yes ____no
4. Are clearly stated criteria established for evaluation of prior nonteaching experience, including military service? ____yes ____no
5. Are supplementary salaries paid for additional services rendered the school outside school hours? ____yes ____no
6. Are supplementary salaries paid on the basis of written criteria which are available to all the professional staff? ____yes ____no
7. Do salary schedules for administrative and supervisory personnel cover all positions below the superintendent's level and recognize such factors as professional preparation, administrative experience, supervisory responsibility, size of staff, length of work year, and complexity of service? ____yes ____no

O. Fringe benefits
1. Is an adequate plan of group health insurance available? ____yes ____no
2. Is an adequate plan of group life insurance available? ____yes ____no
3. Are payroll deductions made upon request of individual teachers for the purchases of U. S. Savings Bonds and group insurance premium? ____yes ____no
4. Does the school system participate in Social Security? ____yes ____no

P. Inservice

1. Is an inservice training program provided? ___yes ___no
2. If so, is attendance required? ____yes ____no
3. If so, when are the training sessions held? (Check each that applies.) after school ____, during regular school hours ____, summer ____, or special day or days set aside for this purpose? ____________________
4. If so, are financial incentives provided? ____yes ____no
5. Are inservice activities related to the teacher's needs and interests? ____yes ____no
6. How are the areas of concern for inservice activities determined and who determines them? Explain:

7. Does the budget of the school system provide for inservice training? ____yes ____no. If so, is it adequate? ____yes ____no

PROFESSIONAL PERSONNEL INFORMATION

SCHOOL______________________________ SCHOOL SYSTEM____________________ DATE__________

List All Regular Instructional Employees

Teachers	Yrs. of college training	Type certif. held	Teaching field-certif.	Grade or subjects assigned	Date of last inservice program attended	Name of course or inservice program	Yrs. in this school system	Yrs. in other school system	Race	
									C	N

NONPROFESSIONAL PERSONNEL INFORMATION

SCHOOL______________________ SCHOOL SYSTEM______________________ DATE______________

Type service	Educational Training	Services Performed	Is inservice training provided	Part or full time	Yrs. in this school sys.	Fringe benefits	Race	
							C	N
A. Teacher Aides								
B. Secretary or clerk								
C. Cafeteria personnel								
D. Custodians								
E. Gen. maint. systemwide								

CHAPTER V

FACILITIES

School buildings of some description probably date from man's first arrival on earth. The curriculum, "basic in nature," centered around father teaching son the art of survival and food procurement while mother instructed daughter in homemaking techniques. The cave probably served as the first one-room school; the surrounding terrain was the laboratory and playground. As the years passed, the curriculum was expanded to meet existing needs; facilities were modernized to house that curriculum. Despite such modernization, log cabins, sod huts, and other inadequate one-room structures still exist in America in the 20th century. In many areas of the country, especially the South and remote rural sections, one-room schools, replete with coalburning stoves, inadequate lighting, leaky roofs, and outdoor plumbing are still in use.

The type of school facilities has changed as our society changed. Urbanization caused larger and more complex facilities to be constructed--massive structures, multistoried, with standard classrooms along both sides of a central corridor. The early sixties saw "finger-plan" architecture--the breaking down of these large massive units into smaller units to relieve traffic congestion and noise and permit natural light to be utilized. "Campus-type" buildings, resulting in "little-schools" arrangements, appeared throughout America. These buildings blended with the terrain and were adaptable to change. A return to smallness seems evident in compact "little-schools," which decentralize large groups of students, favor short exterior walls and indirect lighting, and allow flexibility in interior design. These characteristics reflect recent approaches to schoolhouse construction.

The modern approach to planning facilities reflects many factors not notable in earlier construction. Important among these are

1. Relating environmental effects of the physical space with teaching and learning.
2. Creating an aesthetic environment by utilizing the natural beauty of surrounding terrain.
3. Controlling thermal environment more effectively.
4. Using carpet, colors, simplicity of design, quality lighting, and controlled sound as commitments to sound planning.
5. Differentiating of spaces for students of various age groups, differing abilities, and interests.

In planning facilities the assumption is made that the superintendent bears the responsibility for facility planning, a responsibility which can be delegated. He could recommend that the curriculum director be in charge of the curriculum study, the business manager in charge of the building needs study, the director of public relations in charge of community relations, the building principal in charge of writing educational specifications, and so forth. His position demands that he decide upon the extent of authority that should be delegated to any individuals for whom he recommends responsibility.

The superintendent must recognize that change will occur and careful planning is needed if a functional building is to be built--a building that will affect hundreds or thousands of boys and girls for half a century or more. Regardless of the degree of comprehensiveness in planning, few planning stages last more than three or four years. The relation of this brief period to the life of a building is insignificant.

The superintendent, then, must provide educational facilities in view of:

1. The school district's philosophy
2. The behavioral objectives desired by the district
3. The financial ability of the district
4. The current practices and future trends in the district's educational program or policies.

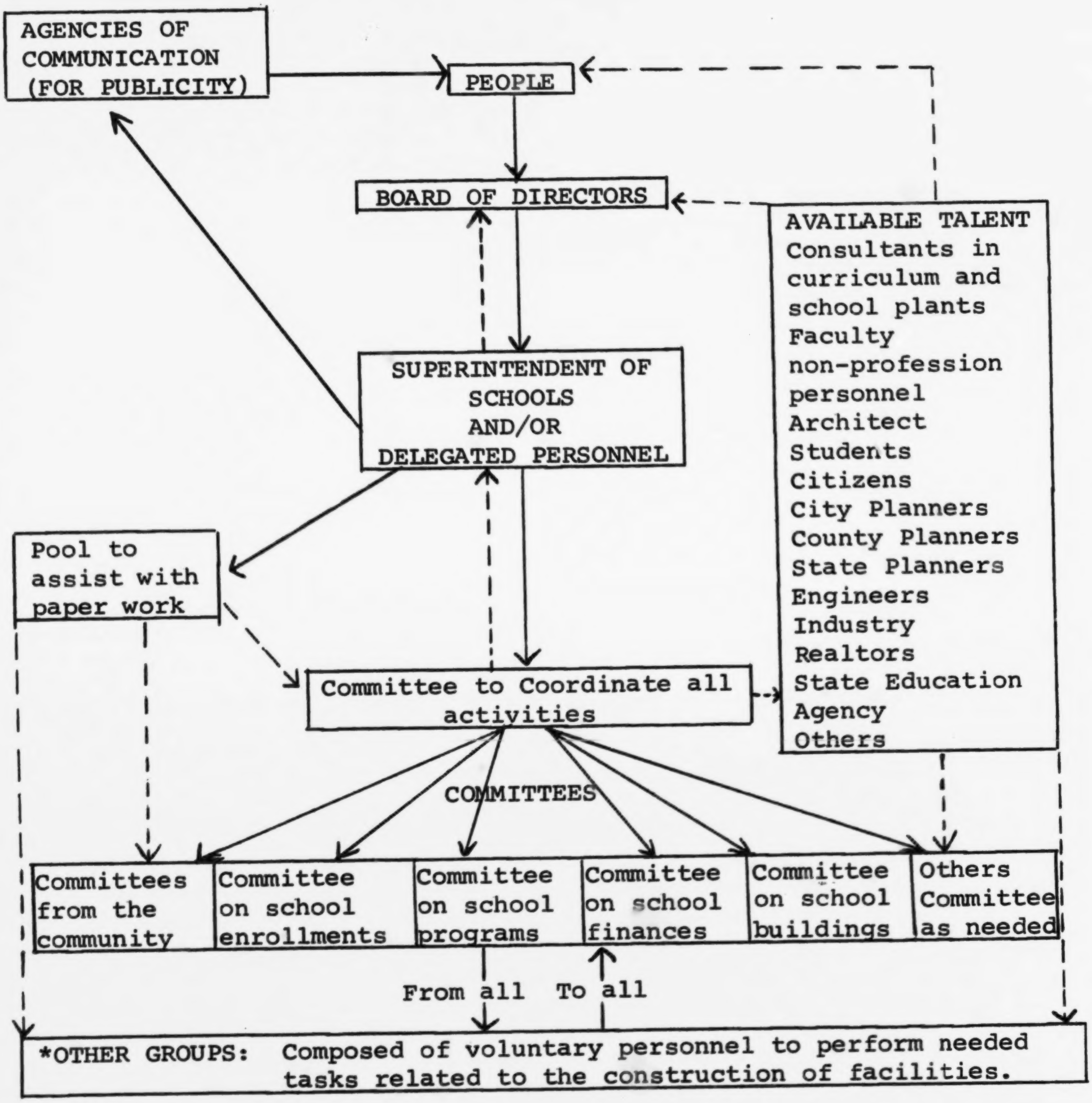
The implication arises that change is inevitable, that planning for change is necessary, and that districts sometimes desire a change. The superintendent allows for flexibility in facility design by cooperative work with the community, the professional and nonprofessional staff of the school system, the architect, various work committees, and resource people. Chart K suggests a method for organizing for a school-plant study--the first step toward construction.

Certain basic data are needed to plan facilities. Data are usually gathered on the four broad areas of: (1) the existing buildings, (2) the program, (3) the present and anticipated enrollment, and (4) school-community. Checklists must be developed in each area to serve the superintendent or the person in charge of planning as a guide for conducting the school-plant study.

Basic data are needed relative to existing plants. These data are part of the total planning process and should be supplied by each school center to the superintendent. Thus, a narrative or visual picture of each educational structure is available during the planning process. All charts should be true representations of the areas they depict.

Chart K

ORGANIZATION FOR SCHOOL PLANT STUDY**


AGENCIES OF COMMUNICATION (FOR PUBLICITY)
PEOPLE
BOARD OF DIRECTORS
AVAILABLE TALENT
Consultants in curriculum and school plants
Faculty
non-profession personnel
Architect
Students
Citizens
City Planners
County Planners
State Planners
Engineers
Industry
Realtors
State Education Agency
Others
SUPERINTENDENT OF SCHOOLS AND/OR DELEGATED PERSONNEL
Pool to assist with paper work
Committee to Coordinate all activities
COMMITTEES
Committees from the community
Committee on school enrollments
Committee on school programs
Committee on school finances
Committee on school buildings
Others Committee as needed
From all
To all
*OTHER GROUPS: Composed of voluntary personnel to perform needed tasks related to the construction of facilities.

*These groups usually exist for a specific task and then disband, example: Car pools for voters on election day.

**Adapted from Donald J. Leu, Planning Educational Facilities, (New York, N. Y.: Center for Applied Research in Ed., Inc. 1965).

Location of School Facilities

Two methods of showing the location of buildings at each school center seem logical: the narrative and the pictorial. Either or both would serve the purpose of identification. A sample narrative description of a school center follows:

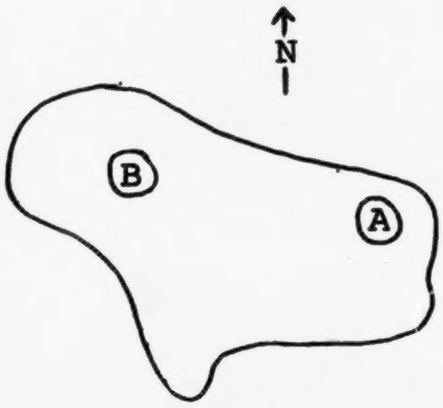
> School center A is located in a rural area. It lies 14 miles east and slightly south of the county seat, Haroldsville, the nearest city or town. A two-lane, macadamized highway (State Highway 31) connects the school center to Haroldsville. The main academic building, located in the center of the school campus, contains the cafeteria, the library, the academic classrooms, and a maintenance center in the basement. The gymnasium, which also contains the music facilities, is located north of the main academic building. The vocational education building is located at the extreme northeast end of the campus. All athletic and play areas are located on the west side of the campus.

An illustration of the pictorial method of describing the same school center is given in Chart L.

Chart L

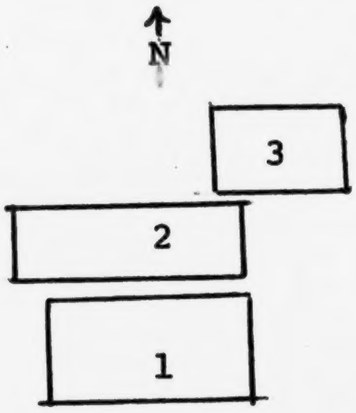
DESCRIPTION OF A SCHOOL CENTER

SCHOOL CENTER A



Location within Harold County

A - School Center A
B - County Sear



Buildings comprising School Center A

1 - Main academic building with library, cafeteria, guidance facilities
2 - Gymnasium
3 - Vocational education building

Standard Classrooms

Information which lists the number of standard classrooms should be assembled prior to or during the planning process. In addition to a simple counting process, determination of building needs requires an examination of the present usage and utilization of the existing buildings at each school center. Those areas classified as special rooms may be listed on this report and the number of rooms in each special area counted. Form VIII illustrates a procedure for collecting this needed information. The procedure may be facilitated by observing the following explanation of each column in the form.

1. In column 1 of Form VIII, all rooms used for any type of instructional program are listed. Other special rooms (cafeteria, library, guidance suite, administrative suite) are merely listed and the number of rooms utilized by that particular division noted in parentheses.
2. In column 2, the area is the amount of square feet available in each classroom. This is computed by measuring the room.
3. The capacity is determined by dividing the square feet each student needs in a specific room into the total square feet of that room. The divisor is obtained from the National Council Schoolhouse Construction Guide for Planning School Plants, 1964 edition. Note: This guide recommends that each student in junior and senior high school be supplied approximately 30 square feet in a normal standard classroom.
4. The student capacity per day is obtained by multiplying the capacity by the number of class periods.

5. The enrollment per day in each classroom is obtained by counting each student of every class who uses that room.
6. The percent of utilization of each room is obtained by dividing the student enrollment per day (column 5) by the student capacity per day (column 4).
7. The range of class is obtained by counting the total number of each class that uses the room.
8. The range percent is obtained by dividing the low and high range separately (column 7) by the capacity (column 3).
9. The type is a brief description of the activity occurring in each room.

Form VIII
STANDARD CLASSROOMS

Room No. Column 1	Area Sq. Ft. Column 2	Capacity Column 3	Student Capacity Per Day Column 4	Enrollment Per Day Column 5	Utilization Column 6	Range of Class Column 7	Range Percent Column 8	Type Column 9
110	672	22	132	141	106.8	26-30	118-137	Eng.
111	672	22	132	172	130.3	28-30	127-137	Eng.
112	672	22	132	175	132.6	28-30	127-137	Eng.
113	672	22	132	160	121.2	25-30	114-137	S.S.
121	960	19	114	99	78.1	15-18	80-98	H.E.
122	768	15	90	144	160.0	0-33	0-200	H.E.
123	672	22	132	136	103.1	24-29	110-132	
124	672	22	132	169	128.0	24-30	110-137	Eng.
125	672	22	132	196	148.9	28-35	127-159	Math.
223	700	23	138	145	105.1	0-31	0-135	Type
200	600	20	120	148	123.3	0-30	0-150	Math.
202	868	25	150	143	95.3	0-31	0-124	Science
203	992	28	168	147	87.5	0-30	0-107	Science
205	992	28	168	146	87.5	0-30	0-107	Science
207	672	22	132	171	130.1	26-30	118-137	S.S.
208	672	19	114	191	167.5	28-23	147-173	Science
209	672	22	132	189	143.1	28-34	127-155	S.S.
210	672	22	132	195	147.7	30-34	137-155	Math.
211	672	22	132	193	145.3	28-34	127-155	Eng.
213	768	22	132	196	148.9	30-35	137-159	Science
214	768	26	156	143	91.7	0-31	0-119	Language
215	672	22	132	193	145.3	30-35	137-159	English
216	672	22	132	173	131.1	27-31	121-140	Math.
220	672	22	132	169	128.0	26-30	118-137	S.S.
GYM SIC	6390	32	192	885	N/A*	72-210	N/A*	P.E.
SHOP #1	2700	30	180	118	N/A	4-24	N/A	Tailor
SHOP #2	2700	30	180	84	N/A	13-15	N/A	Uphol.
SHOP #3	2700	30	180	102	N/A	15-19	N/A	Auto
SHOP #4	2700	30	180	78	N/A	7-18	N/A	Print

Special Rooms: Cafeteria (1); Kitchen (1); Library (2); Principal's Office Suite (2); Guidance Suite (2); Health Suite (2)

*N/A (Not Applicable) refers to those areas where a computation would result in distorted percentages. These areas represent learning activities other than pure academic pursuits.

Form IX illustrates how to determine quickly how many periods each classroom of school center one is used each day. The chart presents a comprehensive assessment of the total school center relative to the number of rooms in use on a given day. A cross may be used to depict the periods that a room is vacant. If a school day has more or less than six periods, the chart may be shortened or extended to accommodate the individual schedule. After an administrator lists the total academic areas available for instruction, a quick glance will determine the availability of space for any special program. In addition, he can determine if a particular discipline area or school center is overcrowded or not being used to capacity.

Form IX

USAGE OF CLASSROOM PER DAY

FIRST FLOOR

ROOM	1	2	3	4	5	6
110		X		X		
111						
112			X			
113						
121					X	X
122						
123						
124						
125				X		

Note: This design should be completed for each floor.

Information on special classrooms will be needed constantly during any planning process. Questions concerning how many usable classrooms are available arise often--in planning facilities, applying for federal and foundation grants, supplying information to the state education agency, and the like. These types of rooms could be added to the data collected on standard classrooms and updated when change occurs. As a final, visual summary of availability of rooms, a diagram of the building would show room location, how used, and total spatial relationships.

Type of Construction

Information on the type of construction should be presented in narrative form and should briefly describe each building at each school center. This information could be collected from a checklist developed by the school system. The completed checklist should contain information on the type of material used in construction, the date of construction, a general description relative to condition, and a comment as to whether the building seems safe for occupancy. Any principal can compile this information, but caution should be exercised. Building principals are not engineers and, if a report strongly suggests an unsafe building, it should be verified by a structural engineer. When submitting this report, the principal should include the name of the school, the estimated capacity, the number of grades (if elementary), and the present enrollment: For example, he might report as follows:

Sample Construction Report

School Center A

Estimated Capacity: 685

Present Enrollment: 1,100

Number of Grades: 29

The main academic building of brick construction, built in 1923, is in extremely poor structural condition. Cracks exist throughout the building. Mortar joints throughout the building need repair. Cracks in floors, tile buckling and cracking, and loose overhead acoustical tile exist throughout the building. Widespread spots exist throughout the building where plaster has peeled. Bricks and holes in the walls are visible in all sections of the building. Exterior and interior trim has rotted in all sections of the building. The hallway baseboards show termite damage. The roof appears to need repair, as evidenced by watermarks on the second floor ceiling. Doors and jambs are rotted. Floors through the building are weakened; traffic causes innumerable movements and squeaks of the floor.

Recommendation: If major repairs are not made, serious consideration should be given to abandonment of this facility.

Note: A similar statement should be written about each separate building at each school center.

Information concerning the number of grades or rooms at each center, the number of students enrolled, and so forth can easily appear as integral parts of other sections (i.e. the section on Type of Construction--see heading of Construction Report). The number of rooms is computed by counting all rooms on Form VIII, Column 1. This will accurately describe all teaching stations. If a count of all rooms is needed, merely look at the completed Chart M and record.

Site Size

Some criteria to evaluate the present site seems needed. The National Council Schoolhouse Construction Guide, 1964, lists these criteria:

Elementary School - 5 acres plus 1 acre for each 100 children

Junior High School - 20 acres plus 1 acre for each 100 children

Senior High School - 30 acres plus 1 acre for each 100 children

The Southern Accrediting Association recommends these criteria:

Elementary School - 5 acres plus 1 acre for each 100 children

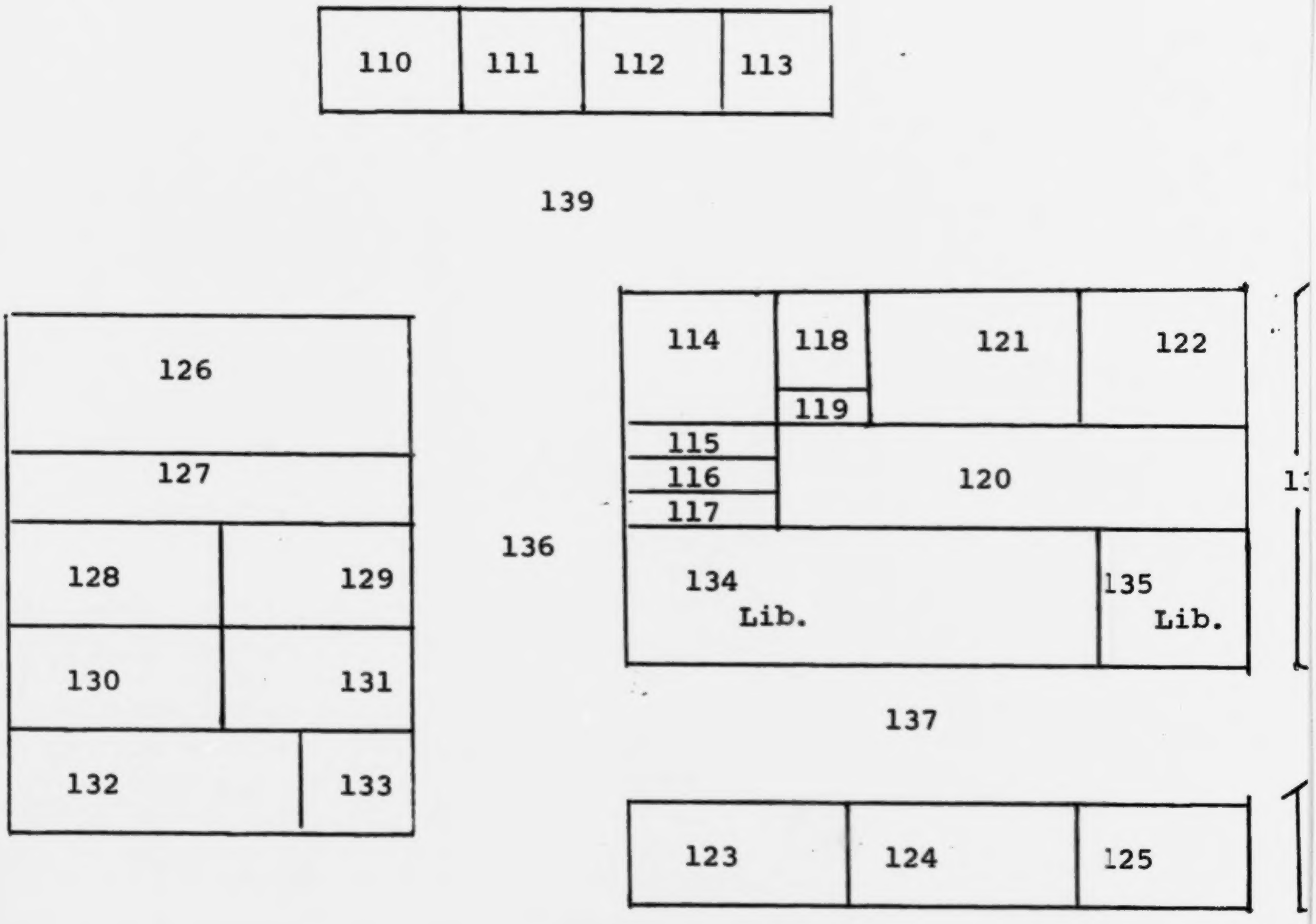
Junior High School - 10 acres plus 1 acre for each 100 children

Senior High School - 10 acres plus 1 acre for each 100 children

Note: Any grade combination of these should use the highest figure as the minimum acres needed.

To report the site size, use the plat map given to the school system by the architect. Information on the site appears in the plat. If this is unavailable, use a tape to measure the site. There are 43,560 square feet in an acre or 4,840 square yards. Irregular shaped sites are more difficult to measure; and an educated estimation is sometimes necessary.

Chart M
SCHOOL CENTER A*
(LOWER FLOOR PLAN)


110
111
112
113
139
114
118
121
122
119
126
115
116
120
127
117
136
128
129
134
Lib.
135
Lib.
130
131
137
132
133
123
124
125

110 - English
111 - English
112 - English
113 - English
114 - Boiler
115 - Girl's Bathroom
116 - Boy's Bathroom
117 - Storage
118 - Boiler Storage
119 - Boiler Storage
120 - Outdoor Patio
121 - Home Economics
122 - Home Economics
123 - Social Studies
124 - English
125 - Typing
126 - Cafeteria
127 - Kitchen
128 - 129 - Guidance Suite
130 - 131 - Principal's Suite
132 - 133 - Health Suite
134 - 135 - Library
136 - 139 - Corridors

Note: In relation to page 121 this chart shows the entire layout o the school. Page 121 is concerned with utilization of rooms used as classes.
The numbers correspond to report on page 121.
Special classrooms--in fact, all classrooms, appear on this chart.
The second floor should also be drawn.

*Not drawn to scale

SAMPLE INVENTORY OF FACILITY NEEDS BY SITE

A. Acreage in site ______________

B. Number and kind of buildings (publicly owned)
   1. Masonry __________
   2. Masonry veneer __________
   3. Frame __________

C. Number of instructional rooms in buildings
   1. General standard classrooms__________; substandard classrooms__________
   2. Self-contained__________
   3. Science laboratories__________
   4. Home economics laboratories__________
   5. Typing laboratories__________
   6. Industrial arts laboratories__________
   7. Agriculture laboratories__________
   8. Band rooms__________
   9. Rooms for exceptional children__________
   10. Library rooms__________
   11. Rated capacity__________; present enrollment__________
   12. Other

D. Number of special service rooms (publicly owned)
   1. Gymnasium__________
   2. Gymnatorium_________
   3. Cafeteria__________
   4. Cafetorium_________
   5. Auditorium_________

E. For this school plant, check the availability of the following items:
   1. Sewerage disposal_____yes _____no
   2. Indoor flush toilets_____yes _____no
   3. Running water under pressure_____yes _____no
   4. Complete new buildings _____yes _____no

F. Age of buildings by date of construction
   1920_____; 1940_____; 1960_____; 1960-65_____; Later:_________

G. Buildings under construction

H. Anticipated classrooms needed

I. Floor plans (attached)

CHAPTER VI

SPECIAL SERVICES

When educational programs are discussed, attention usually centers on the academic, vocational, and extracurricular activities that comprise the major portion of these programs. In addition to these programs, there exists a less familiar area of the school program--those activities which comprise special services. Children must be transported to the school and fed, the physically and mentally sick must be educated, and each child's health must be protected. Thus, transportation, food services, special education, and health services are kinds of special services provided by educational programs.

Transportation

School transportation is an integral part of the school system. It is an auxiliary service only in the sense that it brings the students to the instructional area--the school. A tendency seems to exist in some educational circles to accord transportation an insignificant status--an appendix to the school program. Since the modern consolidated school cannot operate without transportation, school administrators must recognize transportation as a leg on the educational stool and give it the attention it deserves. Transportation then becomes an important factor in planning the total school program.

A school system should carefully pinpoint the exact location of each child--by school grade level--on a map. One method is to use colored pins, each pin depicting a child and each color depicting the child's grade level. Different types of roads should be indicated. All hazards, such as blind curves, railroads, bridges, and the like should be marked on the map.

A route schedule should then be developed; mileage log, families to be served, distances pupils must walk to meet the bus, location of shelters, and conditions of roads must be noted and recorded. Appropriate bus routes can then be initiated.

Percent of Students Transported

In planning for school transportation, it is necessary to know where the children live. The system should carefully consider the state laws governing bus routes, who may ride, and so on. For example, the state law in Alabama stipulates that students living two or more miles away and crippled children (regardless of distance of home from school) are to be furnished transportation.

The percent of students to be transported in Alabama then can be found by adding the number of students living two miles or more from school, and all crippled children, and dividing by the total enrollment of the school. This merely necessitates an analysis of the dot map.

Assume that School Center One (Form V of Personnel) is in Alabama and that 985 students live two miles or more from school center one and that 10 crippled students live in the district. Since school center one has 1,100 students, the percent of students transported is found by dividing 985 by 1,100. The following formula can be used to find the percent to be transported in an individual school or in the system.

TE = Total enrollment

NCL = Number of children living two miles or more from school

NCC = Number of crippled children

$$\text{TE}\,\overline{\big)\,\text{NCL and NCC}}^{\;\text{\% of Students Transported}}$$

If a state law or district policy demanded that other categories of students be transported (for example, any student who must cross a dangerous spot to reach the school), then the total number of these categories would be added to the dividend.

Number of Buses

The number of buses needed will depend on the number of students that are to be transported, the length of the routes, and the seating capacity of the buses used.

In the state of Alabama, the policy determining the number of students permitted to ride a bus in most school systems is the seating capacity of the bus plus 10 percent. School center one's policy, which reflects the district's policy, limits bus loads to 59 students per bus. If this is a set policy and if no feeder routes exist, the number of buses needed will be easy to determine.

Form X can be used to determine the number of buses needed in any school district. Use the chart as follows:

1. Determine the seating capacity of the buses to be used.
2. Go across the chart to the right to the number of students that are to be transported. (If the exact number is not on the chart, use the nearest larger number to it.)
3. Look to the top of the chart for the number of buses needed.

Form X

DETERMINING NUMBER OF BUSES NEEDED

Number of Buses

Seating Capacity	1	2	3	4	5	6	7	8	9	10
48	104	208	302	416	520	624	728	832	936	1,040
54	118	236	354	472	590	708	826	944	1,062	1,180
60	132	264	396	528	660	792	924	1,056	1,188	1,320
66	144	288	432	576	720	864	1,008	1,152	1,296	1,440

Number of Students to be Transported

Number of Buses

Seating Capacity	11	12	13	14	15	16	17	18	19
48	1,144	1,248	1,352	1,456	1,560	1,664	1,768	1,872	1,970
54	1,298	1,416	1,534	1,652	1,770	1,888	2,006	2,124	2,242
60	1,452	1,584	1,716	1,848	1,980	2,112	2,244	2,376	2,508
66	1,584	1,728	1,872	2,016	2,160	2,304	2,448	2,592	2,736

Number of Students to be Transported

NOTE: School Center One (Form V of Personnel) has 995 students to be transported. The seating capacity of the buses to be used is 54. Under the seating capacity column go to the block with the number nearest to 995 but not less than 995. The number is 1,062. Look above to the number of buses needed. Nine buses are needed to transport the students to school center one. The same procedure can be used to determine the number of buses needed for the system.

Number of Privately Owned Buses

The question of ownership will always arise when planning school transporation. The issue of privately owned buses versus publicly owned buses has been studied and tried throughout the United States.

In several states, boards of education have the authority to enter into contract with an individual or individuals to provide transportation to school for children who meet the state's requirements for public transportation. Under this arrangement the board of directors knows the exact cost of transportation in advance. In addition, the board does not have to purchase buses or provide for bus maintenance.

On the other hand, if the district owns the bus fleet, it has complete control of the transportation system and a more efficient transportation system usually results. Routes and time schedules may be changed easily; an in-service program for drivers can be offered.

A school system should carefully review the findings of several studies before deciding whether or not to contract its transportation services. If transportation is contracted, it becomes a simple matter to count the number of contract vehicles through the central office's records.

Number of County-Owned Buses

The number of county-owned buses is derived by subtracting the number of contracted buses in use from the total number of buses in operation. In general, however, this figure may be determined by a simple count of school buses, since most systems in the United States own their buses. In the South, in particular, almost all school systems own and operate their own bus fleet.

Food Services

There is no longer any question of the necessity of having food services in an up-to-date school. This is especially true of large city schools or schools where the children travel long distances to reach their destinations. The cafeteria is not merely a place where cold food brought from home may be eaten or a meal may be served; rather, it is a department of the school organized for the purpose of maintaining the health of pupils through their eating--very much as the physical education department cares for their health through exercises. It must be a place where the students can obtain warm, wholesome food served in an appetizing manner at a reasonable price.

There are four basic types of food service facilities:

1. Complete preparation, food services and dining area planned for cafeteria service.
2. Central food preparation for several school lunch departments in school system with facilities for serving and dining in each school, commonly called satellite lunches.
3. Kitchen type of food preparation, with dining provided in the classroom, gymnasium, or areas which are used during the rest of the day for other purposes.
4. Complete preparation, service, and dining facilities planned for table service.

Regardless of the food service preference, considerable planning must occur at the central office level and at each school center before an efficient and functional program can be developed. The school system must know, both systemwide and by individual school, the percent of the total enrollment who are fed, the percent of the children being fed who receive free meals, how many cafeterias operate daily throughout the system, the number of free meals served daily, and the amount each child pays per meal.

Percent of Children Fed

The percent of children to be fed can be obtained by using the following formula:

% of Children Fed
Total Enrollment / Number Fed

Example: Enrollment = 1,100
Lunches served = 965

.8872 or 87.72%
1,100 / 965

It becomes a simple matter, then, to determine the percent of children being fed for the entire district. For example, turn to Form V of Personnel, look at column one and total the school enrollment. This equals 7,366 students in the district. Count the number fed at each school center where food is served; assume this to be 6,030 students.

.8186 or 81.86% the percent of
Thus, ...7,366 / 6,030 children enrolled
in the district
who are fed.

Sample Form For Free Lunch

NAME OF CHILD______________________________GRADE____________________

NAME OF PARENT OR GUARDIAN____

ADDRESS____

OCCUPATION____

MONTHLY INCOME (Please check appropriate amount)

$150 or less_____	$151 - $200_____	$201 - $250 _____
$251 - $300 _____	Above $300 _____	

NUMBER LIVING IN HOUSEHOLD______________________

____
Signature of Parent or Guardian

The Number of Cafeterias Operating

Each school campus should have a cafeteria. This, of course, assumes that each campus is large enough in student population to support such a venture. In some systems, schools closely adjoining each other share the same food-service facilities. For example, note that in Form VII of Personnel, only five of the school centers operate a cafeteria and prepare meals. This information, in any system, can be obtained by simply counting the schools where lunch is prepared and served. Some systems, which use the satellite method, may have a cafeteria at each school center.

Number of Free Meals Served Daily

The maximum number of students receiving free lunches is determined by the principal; the number actually eating free, however, must be counted daily since some of the students on the approved list may be absent or may not eat each day. This is done by counting them at each school center and reporting that number to a central agency.

Price Charged for Meals

The amount charged for lunches at any school center is approved by the board of education. Since approximately 85 percent of the operating expenses for the maintenance of the food-service program is from the local level, the school system must not undercharge. On the other hand, consideration must be given to the ability of the parents of the children to pay the price charged for a meal.

Most food-service programs are federally subsidized; consequently, these programs must follow the regulations established by the Department of School Lunches. For example, one such regulation is that a cafeteria cannot maintain a cash balance of more than two months' operating expenses.

The cost of operation, less assistance from federal sources, must be considered. In the South, a fairly average price per meal is 25-35 cents per child, Grades 1-6; 30-40 cents per child, Grades 9-12. If possible, the system should observe a uniform charge throughout the system.

Special Education

Special education is the provision of services additional to or different from those provided in the regular school program by a systematic modification and adaptation of equipment, teaching materials, and methods to meet the needs of exceptional children.

Handicapped Children

The term handicapped covers a wide range of exceptionals in children. The following types can be found in any medium-sized system: blind, partially sighted, physically handicapped, educable mentally retarded, trainable mentally retarded, speech and hearing handicapped.

Although a system needs to provide educational opportunities for all its handicapped children, limited facilities and monies plus inadequate and poorly trained personnel necessitate careful planning to insure that the available finances and personnel will be utilized efficiently and effectively. Since the educable mentally retarded category usually has more children than any other category of handicapped children, a school system should assess this program first.

EMR classes. To determine the number of handicapped students for a special class the students who have been recommended by their classroom teacher should be carefully tested.

For a student to be admitted to an EMR class, he should have an IQ of at least 50 and not more than 80. The Binet Test could be administered to those students whose achievements and general performance indicate such a need. Other series of tests, as proposed by the system's guidance counselor, could be used to determine mental ability.

The person administering the tests, in most states, must be approved by the state department of education. This person is usually a guidance counselor or a guidance supervisor. After the tests are given and scored, a certain number of students might fall in this ability range--50-80 IQ. These people will then comprise the EMR classes.

For clarification, assume that the number of students within the IQ range of 50-80 is 43. Most states, especially those whose programs are totally or partially supported by federal funds, limit the enrollment in an EMR class to 15 students. Thus, this hypothetical situation would have three EMR classes. All systems can compute their number of EMR classes by noting the regulation governing admission into the program and maximum number of students that can be placed in an EMR class.

Adult Education

The need for a formal adult educational program will vary from community to community; due to the complexity of our present-day society, adult education programs are an integral part of many school systems.

There are many private programs of adult education in the United States. Since these fall outside the scope of a school system's interest, they are not discussed. Public programs are many and varied in content; interests range from hobbies and personal development to occupational and public affairs. Costs are usually shared by the participants and the sponsoring school system. Since the concept of public responsibility for continuing education lacks full public support, there is no standard procedure that covers financial support of the programs.

Educational programs for adults are conducted in almost every subject clustered around every major area of human need for further learning. Space prohibits a description of an examination of the kinds of programs that are offered to adults. School systems interested in a complete discussion of various program areas should see Malcolm S. Knowless (ed.), Handbook of Adult Education in the United States (Chicago: Adult Education Association, 1960), Part IV, pp. 393-550.

Basically, adult education could be divided into these programs areas: Academic education, which includes elementary, secondary, and university; fundamental education, which attempts to train adults to cope with modern society; education for later maturity, which attempts to help older individuals develop new goals and activities to sustain these in later years; creative art, which includes production and creation in varied art forms or the study and appreciation of various art forms; liberal adult education, which attempts to attach value and status to particular content areas; public affairs education, which is designed to develop knowledge of domestic and international public issues; home and family education, which is concerned with parent education; and community development.

In planning an adult education program, careful attention should be paid to the number of adults enrolled in the program at each school center and to the number of classes needed to house these people. A school system should carefully assess the needs of the community before embarking upon a program of adult education.

The number of adult education classes will depend on the number of adults in the community who have a desire to further their education. Because of the nature of the learning experiences, adult classes should be limited to 20 per class.

Using this as a divisor, the number of classes can be determined. If more than 20 are enrolled in a class, then a counting procedure should be used.

A survey of the community should be made to determine the number of adults who are interested in attending adult classes. Since adult education is usually under the supervision of the state department of education, survey forms may be secured from the state education office.

When the survey is completed and tabulated, a number of adults in the county will have expressed an interest in attending adult classes. From this list will develop the number of classes; a count of the number attending at each school center will produce the number of participants at each school center and systemwide.

Other Special Services

Most school systems do not have the personnel to provide all the special services desired; consequently, utilization of outside services becomes necessary.

Various services are provided by high schools other than the ones previously discussed. A district should list these services and determine their function. Form XI lists some special services not previously discussed in this guide.

Form XI

Special Services

Services	Have	Do Not Have	Intend to Have
Vocational Education			
Vocational Agriculture			
Vocational Home Ec.			
Trades and Industries			
Distributive Education			
College Extension Courses			
Credit Courses			
Noncredit Courses			
Guidance and Counseling			
Placement			
Testing Services			
Handicapped: Programs			
Blind			
Partial Sight			
Physical Disability			
Trainable Mentally Retarded			
Speech Disorder			
Hearing Disorder			
Exceptionally Bright			
Other____________________			

Please check the appropriate space.

Health Services

Authorities generally agree that a modern school health program consists of three aspects: healthy environment, instruction in health and safety, and school health services.

Schools constantly strive to better their efforts in instructing students in factual knowledge relative to what makes good health; this will supposedly develop good health habits. Studies have shown that students who are unhealthy and physically unfit do not perform adequately academically. Consequently, a close relationship seems to exist between scholastic achievement and the physical condition of the student.

The Number of School Nurses

The county health department in most states attempts to assist local school systems in combating health problems. The two most prevalent methods are rendering specific assistance to the local systems and providing school nurses. In many systems, the number of nurses that the county health department can subsidize will not meet the requirements of the systems. In that case, school systems must either forego the needed services or employ the nurses themselves. In any event, the local system should know the current number of nurses available for duty.

Services Rendered by the Health Department

Although this list is by no means inclusive and local systems should explore the services which can be offered, a typical health department will offer some or all of the following services:

1. Eyes checked
2. Hearing checked
3. Chest X-ray
4. Blood Test
5. Immunization for:
    a. Typhoid fever
    b. Smallpox
    c. Polio
    d. Diphtheria
    e. Others as needed
6. Case Work
    a. Lice
    b. Itch
    c. Impetigo
    d. Others as needed
7. Others upon the request of the principal.

Sample Inventory of Special Services

A. Transportation

1. Number of students transported _______

2. Percent of students transported _______

3. Total number of buses _______
privately owned _______
publicly owned _______

4. Earliest pick-up _______A.M.
Latest delivery _______P.M.
Longest route _______miles
Oldest bus _______year
Newest bus _______year

B. Food Service

1. Number of students fed lunch daily _______
Number of students fed breakfast daily _______
Percent of students fed lunch daily _______%
Percent of students fed breakfast daily _______%

2. Does school system participate in surplus agricultural commodity program? _____yes _____no

3. Major food supplier ________________________________
name

4. Is food prepared on the premises? _____yes _____no

5. Are menus centrally planned? _____yes _____no

6. Cost of lunch _______elementary _______high
breakfast _______elementary _______high

7. Number of free meals served daily _______

C. Health Services

1. Kind of health services provided:
__________dental
__________x-ray
__________immunization
__________visual examination
__________hearing examination
__________general physical examination
Frequency of examinations __________.

2. Is school doctor available? _____yes _____no

3. Is school nurse available? _____yes _____no

4. Is personal hygiene part of course of study in school?
_____yes _____no What course?________________________

D. Special Education
Are provisions made for educating

1. Mentally retarded? _____yes _____no

2. Gifted? _____yes _____no
enrollment __________

3. Speech handicapped? _____yes _____no
enrollment __________

4. Hearing handicapped? _____yes _____no
enrollment __________

5. Visually handicapped? _____yes _____no
enrollment __________

E. Adult Education
Is adult education provided? _____yes _____no

List courses offered: ______________________________
____
____

Enrollment: ________

CHAPTER VII

FINANCE

The provision of many of the ingredients of quality education, such as a sufficient number of well-qualified and dedicated administrative and instructional personnel, adequate learning supplies and equipment, and safe and functional school buildings, is dependent largely on adequate financial support. It should be the continuing concern, therefore, of all citizens that these public schools receive adequate funds and that there be maximum efficiency in spending the funds made available to support schools. Thus an inventory of financial needs and resources must encompass, at least, an analysis of revenues and expenditures.

Revenues for Education

Revenues for public schools come from the three main government sources--local, state, and federal. The percentage of revenue receipts from each source varies markedly among the states. General revenue patterns exist, however, within each major source.

Local Support of Education

In the typical school district in the United States more than half of the money to finance public schools comes from local sources. Despite its major role in financing public education, the local school district has its limitations in financing education. The typical local district is dependent mainly on the property tax for the financing of schools and this tax source has severe limitations. One criticism of the property tax is its slow response to economic growth. Recent studies have shown, however, that the tax is in fact quite adequately elastic and responsive to economic growth. In some communities the tax base has been eroded by increasing and inequitable exemptions. The tax is also under fire for being regressive especially on the poor and elderly. Relief in this area is possible with adjustments and tax credits on state income taxes. Also, in many local school districts, extreme variations in property valuations sharply limit the percent of the local school budget which the property tax can support.

In nearly all states and localities there are basic reforms which should be made in the way the local property tax is administered. These reforms include (1) uniform and expert assessment of property, (2) the removal of improper exemption from taxation for favored groups of taxpayers, and (3) the removal of unduly restrictive state limits on local property-taxing powers.

The legislatures of some states have authorized certain local nonproperty taxes to supplement those collected on property. In some large urban areas such taxes are feasible, but in the typical small school district they would not be practical unless administered jointly over a large area. No matter what taxing powers localities have, they will still differ markedly in ability to pay taxes.

State Support of Education

Since the Constitution of the United States makes no reference to education, under the provisions of the Tenth Amendment the basic responsibility for education has been allocated to the states. Therefore, without exception, in every state of the United States education is considered a state function within limitations imposed by court decisions. This simply means that while direct control of the education process has been delegated to local boards, the state has the duty and responsibility to see that every person of school age is provided an opportunity to receive an education; hence, it is obligatory for the state legislature to provide schools for all the children of the state. In order to discharge this responsibility properly, the state must define a minimum educational program which shall be made available to every child of school age within the state. Having defined this minimum offering, the state must then design a school financial support plan which guarantees that no school system within the state shall have an educational program below this defined minimum.

Consequently, most states have adopted a minimum foundation finance program act because:

1. The state has a responsibility for education of its citizenry.
2. Its wealth is not uniformly distributed.
3. It must establish schools sufficient to furnish children in each locality educational opportunities up to a prescribed minimum.
4. It must use its wealth to guarantee that minimum will be met.

The development of an adequate foundation program plan for school support begins with the identification of educational services to be included for all public schools. These essential services are then translated into terms of the amounts required to provide them. In other words, the cost of the program is calculated. The cost of the program is then divided between the state and the local school district on the basis of the relative taxpaying ability of the local district.

Procedures by which foundation program amounts are calculated in the states illustrate a wide range of state control or direction of local school expenditures. One extreme is represented by the foundation program plan that establishes an approved amount per pupil or classroom unit, and allows the local school administrators and board members to budget this amount for local school services. This has been called a "lump-sum approach."

The other extreme is presented by the budget-item plan that includes specific allowances for numerous separate items in the budget and restricts the use of program money to these specific items. For example, amounts may be specified for salaries of teachers, sick leave of teachers, instructional supplies, and other items of operation or maintenance, and restricted to use for only these purposes.

When the foundation program amount, or cost of the program, has been objectively determined for each school district, the sum of these amounts represents the total foundation program amount to be supported jointly by the state and by the local districts. The next step is the determination of the local share of the total to be raised by each school district.

The amount of money to be provided from local sources for support of the foundation program is generally established as the sum of the required district contributions. Typically, these are the proceeds of a specified tax rate applied to the assessed value of taxable property, or a required amount as established by an index of taxpaying ability. Both of these methods provide for the direct determination of the local share. In other instances, the proportion to be supplied locally is indirectly determined by stating the percentage of the total amount to be provided by the state, or by specifying a state-appropriated amount for the state's share of the foundation program amount.

The local share for the foundation program should represent a uniform local effort for all of the participating districts in a state. For this reason, a measure of local fiscal capacity is needed. Usually this measure is the amount of (1) local property assessed valuations, (2) local assessments as determined under state supervision, or (3) valuations of local property, equalized by state ratios of assessed to actual property value. A standard tax rate applied to such valuations produces the amount to be provided locally. However, several states use a fourth method. They calculate economic indexes of taxpaying ability and apply these index values to the total local support obligation in the state to establish the amount of money to be raised locally for each county. Under the index method several economic factors associated with the market value of property are used to calculate indexes of ability. These factors are assigned weightings to make the index a reasonably accurate measure of the ability of the people to raise local tax money for schools. Items used in calculating indexes of taxpaying ability include the following:

1. Sales tax
2. Passenger car licenses paid
3. State personal income taxes paid
4. Value added by manufacture
5. Value of farm products
6. Number of gainfully employed workers, excluding agriculture and government
7. Consumer purchasing power
8. Scholastic population
9. Payrolls
10. Value of minerals produced

In summary, the purpose of the state foundation program support plan is to assure for all public schools in all school administrative units sufficient funds to pay for a program of education that is at least as good as that defined by the legislature as basic. For the basic educational program, the local board of education understands that state funds will be provided to supplement any required local share so that the total amount needed fully to finance the defined foundation will be available.

It should be understood that under the foundation program the legislature has guaranteed the basic portion of the program only, and that school administrative units may want to offer programs that are better than the foundation. This extra portion above the foundation is the responsibility of the local taxpayers; the taxing power to exceed the foundation support level is called "local leeway." State legislatures usually have no responsibility for financing this extra portion except to approve legislation which makes it possible and practicable for local communities to tax themselves in the effort to obtain educational services which are better than the defined foundation. Leeway levies exceeding the required local contribution to the foundation program are essential to the satisfactory operation of the foundation program plan.

Federal Support of Education

In the large majority of all school districts state and local funds for the operation of the public schools are supplemented with federal funds. In many school districts these funds comprise as much as 10 per cent of the total revenue receipts for schools and are a significant source of school financial support. The major present sources for federal school financial support include the following:

1. The National Defense Education Act
2. The Elementary and Secondary Education Act
3. The Vocational Education Act of 1965
4. Aid for federally impacted areas.

The local school districts should make maximum utilization of these funds to support programs which are consistent with school board objectives.

Expenditures for Public Schools

Expenditures for the operation of the public schools are generally broken down into three major categories--current expenditures, capital outlay, and debt service. Current expenditures are subdivided by the function or purpose served by the expenditure.

Current Expenditures

The purposes for which funds are expended in the local school districts are classified according to budget classifications prescribed by the state board of education. Because of the efforts of the U.S. Office of Education to standardize these classifications the expenditure functions are rather uniformly defined in each state under the classifications which follow.

Administration. Expenditures for administration are expenditures for those activities which have as their purpose the general regulation, direction, and control of the affairs of the school district that are systemwide and not confined to one school, subject, or narrow phase of school activity.

Instruction. Expenditures for instruction are those related directly to the teaching of pupils, such as salaries of teachers, substitute teachers, principals, assistant principals, supervisors of instruction, and personnel offering guidance and psychological services. These expenditures also include the cost to the school district of library books, testing, and other instructional supplies and materials.

Operation of Plant. The expenditures budgeted for the operation of the school plant provide for all costs related to keeping the school plants and grounds ready for use, including expenditures for custodial service, electricity, fuel, water, and telephone.

Maintenance of Plant. Expenditures for maintenance of buildings include expenditures for keeping the grounds, buildings, and equipment in serviceable condition either through repairs or by replacement.

Auxiliary Services. The function of auxiliary services indludes the subfunctions of attendance services, health services, and pupil transportation. The purpose of expenditures for attendance services is the improvement of attendance of children at school and the adjustment of pupils to school environment. This is promoted by the enforcement of compulsory attendance laws, in conferences with pupils and parents, and through social and legal agencies. Health services expenditures are made for the purpose of ascertaining the needs of pupils in the fields of physical and mental health, and consist of salaries and other expenses of medical, dental, and school nurse services. Pupil transportation accounts are used to record the expenditures for the conveyance of pupils, either between home and school or on trips for curricular activities.

Fixed Charges. Fixed charges are expenditures of a generally recurrent nature which are not readily allocable to other expenditure accounts. They include such expenditure items as the school district's contribution to employee retirement, insurance premiums, rental of land and buildings, and interest on current loans.

Other functions. Other current expenditure purposes, other than the major functions listed in the preceding sections, include food service, student-body activities, and comunity services. Food services are those activities which have as their purpose the preparation and serving of regular and incidental meals, lunches, or snacks in connection with school activities. Student-body activities are direct and personal services for public school pupils, such as interscholastic athletics, entertainment, publications, clubs, band, and orchestra, that are managed or operated by the student body under the guidance and direction of adults, and are not part of the regular instructional program. Community services are those services provided by the school district for the community as a whole, or some segment of the community, excluding public school and adult education programs operated by the school district. They include such items as public libraries and recreational programs operated by the school district.

Capital Outlay and Debt Service

Capital outlay expenditures are those which result in the acquisition of fixed assets or additions to fixed assets. They are expenditures for land or existing buildings, improvements of grounds, construction of buildings, additions to buildings, remodeling of buildings, or initial or additional equipment. Debt service consists of expenditures for the retirement of debt and expenditures for interest on debt, except principal and interest of current loans.

Funds for capital outlay purposes in a local school district may include (1) state capital outlay funds (2) current local tax levy for building purposes, and (3) proceeds from long-term bond issues. Legal requirements in many states specify the use of serial bonds, set limits on interest rates to be paid, and limit the total bonded inbedtedness which a school district may accrue to a certain percentage of assessed valuation of taxable property. Many school districts are unduly restricted in their ability to issue school bonds for capital outlay purposes by low assessment ratios and statutory limitations on indebtedness.

Debt service tax levies are those levies required to make annual principal and interest payments on outstanding indebtedness. Where state limits on local tax rates exist, debt service levies are generally those levied above the rate limitation.

Sample Inventory of Finance Needs

An adequate inventory of finance needs in a local school district should include comprehensive data on (1) the adequacy of the present level of financial support, (2) the amount of additional resources needed to bring level of support to a point of adequacy, and (3) the ability of the citizens of the district to provide additional financial support. Data relating to each of these concerns are outlined in the following sections.

I. Is the present level of financial support adequate to achieve a quality program of public education?

   A. Are there program deficiencies which directly relate to a lack of financial input?

      1. Are classrooms staffed with well qualified dedicated teachers and, if not, is this due to salary schedule deficiencies?

      2. Do teachers work under conditions most conducive to effective teaching--reasonable class loads, adequate teaching supplies and materials, and so on?

      3. Are school plant facilities adequate?

   B. Does comparison of expenditure data with other school systems of comparable size and ability support the need for additional financial support.?[1]

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[1] Comparative data is available annually from the *Annual Report of the State Superintendent of Education* in the respective state and in the "Annual Cost of Education Index," *Schol Management*, January issue.

1. Quantifiable aspects of administrative expenditures in the school district and comparisons with comparable school districts in state and in the United States
    a. Per pupil expenditure for administration
    b. Per pupil expenditure for salaries of professional administrators
    c. Per pupil expenditure for central administrative clerks and secretaries
    d. Percentage of current expenditures allocated for administration
    e. Percentage of current expenditures allocated for salaries of professional administrators
    f. Percentage of current expenditures allocated for administrative clerical and secretarial salaries
    g. Number of professional administrators per 1,000 pupils
    h. Number of administrative clerks and secretaries per 1,000 pupils
    i. Average salary for professional administrators
    j. Average salary for administrative clerks and secretaries
2. Quantifiable aspects of the expenditures for instruction in the school district and comparisons with comparable school districts in the state and in the United States.
    a. Per pupil expenditure for instruction
    b. Per pupil expenditure for classroom teachers' salaries

c. Per pupil expenditure for salaries of instructional personnel other than classroom teachers

d. Percentage of current expenditures allocated for instruction

e. Percentage of current expenditures allocated for classroom teachers' salaries

f. Percentage of current expenditures allocated for salaries of instructional personnel other than classroom teachers

g. Per pupil expenditure for salaries of instructional clerks and secretaries

h. Per pupil expenditure for teaching materials

i. Percentage of current expenditures allocated for salaries of instructional clerks and secretaries

j. Percentage of current expenditures allocated for teaching materials

k. Number of classroom teachers per 1,000 pupils

l. Number of instructional personnel, other than classroom teachers, per 1,000 pupils

m. Average salary for classroom teachers

n. Average salary for instructional personnel other than classroom teachers

o. Starting salary for a classroom teacher

p. Maximum salary for a classroom teacher

q. Number of increments in teachers' salary schedule

r. Average salary for instructional clerks and secretaries

3. Quantifiable aspects of the expenditures for auxiliary services in the school district and comparisons with comparable school districts in the state and in the United States.

    a. Per pupil expenditure for health services

    b. Per pupil expenditure for salaries of health personnel

    c. Percentage of current expenditures allocated for health services

    d. Number of health personnel per 1,000 pupils

    e. Per pupil expenditure for attendance services

    f. Percentage of current expenditures allocated to attendance services.

4. Quantifiable aspects of expenditures for operation of plant in school district and comparisons with comparable school districts in state and in the United States.

    a. Per pupil expenditure for plant operation

    b. Per pupil expenditure for heating buildings

    c. Per pupil expenditure for utilities other than heat

    d. Percentage of current expenditures allocated for plant operation

    e. Percentage of current expenditures allocated for heat

    f. Percentage of current expenditures allocated for utilities other than heat

    g. Per pupil expenditure for plant operational salaries

    h. Number of plant operational personnel per 1,000 pupils

i. Percentage of current expenditures allocated for plant operational salaries.

5. Quantifiable aspects of expenditures for maintenance of plant in the school district and comparisons with comparable school districts in the state and in the United States.

   a. Per pupil expenditure for plant maintenance

   b. Per pupil expenditure for plant maintenance salaries

   c. Percentage of current expenditures allocated for plant maintenance

   d. Percentage of current expenditures allocated for plant maintenance salaries

   e. Number of maintenance personnel per 1,000 pupils.

6. Quantifiable aspects of expenditures for fixed charges in the school district and comparisons with comparable school districts in the state and in the United States.

   a. Per pupil expenditure for fixed charges

   b. Percentage of current expenditures allocated for fixed charges.

7. Quantifiable aspects of expenditures for capital outlay and debt service in the school district and comparisons with comparable school districts in the state and in the United States.

   a. Per pupil expenditure for capital outlay

   b. Per pupil expenditure for debt service

   c. Percentage capital outlay expenditures are of current expenditures

   d. Percentage debt service payments are of current expenditures

e. Outstanding indebtedness per pupil

f. Percentage bonded indebtedness is of assessed valuation of property

g. Percentage bonded indebtedness is of true valuation of property.

II. What are the additional resources needed to bring financial support to level of adequacy?

A. For administration

B. For instruction

C. For auxiliary services

D. For operation of plant

E. For maintenance of plant

F. For fixed charges

G. For capital outlay

III. Do the citizens of the school district have the ability to provide additional financial support for public schools?

A. What are present sources of revenue? Are these sources being tapped to maximum?

B. How does local tax millage or other sources of revenue divide between required contribution to foundation and "leeway" for enrichment?

C. Quantifiable aspects of effort to support public education in the school district and comparisons with comparable districts in the state and in the United States

1. Assessed property valuation per pupil

2. True property valuation per pupil

3. Percentage per pupil expenditure for all purposes is of true property valuation per pupil
4. Per pupil income raised locally
5. Per pupil income from state
6. Per pupil income from federal sources
7. Percentage local revenue is of total revenue
8. Percentage state revenue is of total revenue
9. Percentage federal revenue is of total revenue
10. Percentage local revenue is of effective buying income of district.

GUIDE FOR ALLOCATION OF RESOURCES TO NEEDS: DETERMINATION OF PRIORITIES

I. Introduction

The summary statement for Phase I has indicated a paradigm which illustrates the central concern of the Survey of Needs. This central concern is the instructional program which is learner-oriented. The change in learner behavior as a part of the instructional program can be a focal point upon which the priority of needs should be established. A number of other peripheral factors may be suggested. The paradigm suggests one way in which these peripheral factors may be utilized. Other considerations may be utilized with the paradigm and listed here not in order of importance, but as concomitant factors that must be considered at the various levels suggested by the paradigm.

Primary Need Instructional Program-Learner-Oriented Emphasis
(Change in Learner Behavior)

A. Direct Need Functions
   1. Instructional personnel
   2. Instructional material
   3. Special services

B. Support Need Functions
   1. Facilities
   2. Transportation
   3. Personnel

C. Concomitant Need Factors
   1. Numbers
   2. Time
   3. Financial Constraints-additional funds or reallocation of funds
   4. Other

The establishment of the priority of needs should be based on the functions outlined in the preceding paradigm and on considerations of the stated and other concomitant factors which might be added. This listing of the priority of needs may now be utilized to establish new and restated purposes and objectives for the school system which will allow the selection of various or alternative programs of action, e.g. the SEL Pathways to Better Schools Series.

II. A task force consisting of professional, paraprofessional, and lay people should be established to analyze and determine needs.

A. Analysis of the needs
  1. Nature of needs
  2. Review (history) of needs
  3. Feelings concerning needs

B. Categorizations of needs
  1. Administration
  2. Instruction
  3. Personnel
  4. Facilities
  5. Special devices
  6. Transportation
  7. Finances

C. Analysis of needs as related to:

Brief statement of needs	People affected	Number	Time	Cost

D. Fiscal resources

1. Local

a. tax $__________

b. gifts $__________

c. others (identify) $__________

Total $__________

2. State

a. alloted funds $__________

b. vocational $__________

c. transportation $__________

d. special (EMR. etc.) $__________

e. adult $__________

f. Title III $__________

g. textbook $__________

h. library $__________

i. others (identify) $__________

Total $__________

3. Federal

a. P.L. 874-815 $__________

b. Title I $__________

c. Title IV $__________

d. Title II $__________

e. manpower training $__________

f. model cities $__________

g. NDEA $__________

Total $__________
GRAND TOTAL $__________

E. Human resources
    1. Local
        a. professional other than teachers
        b. trades
        c. fine arts
        d. other (identify)

    2. State
        a. State Department
            (1) specialist area
            (2) subject matter
            (3) director of federal program
            (4) facilities
            (5) transportation
            (6) others (identify)

    3. Federal
        a. Title I Director Regional
        b. Title IV Director Regional
        c. others (identify)

F. Establish priority of needs
    1. Rank needs
    2. Determine alternative
    3. Plan solutions

GUIDE FOR PROGRAM ACTION

Program action on one or more sets of needs previously determined to be high-priority for the local school system may result from local decisions to 'do something' about the problems phrased as needs. Program action may also take place as an opportunistic response to interests, however various and of whatever duration, in the local school system on the part of specific local or extralocal groups, agencies, educational research and development organizations, publishers, and others. Program action, finally, may occur as an event which is anticipated by the fact (or the development) of a long-term comprehensive plan for educational change.

Program action, that is, the predetermined effort to respond in a more or less organized way to one or more stated sets of educational needs identified prior to the onset of a programmatic response, need not be construed only as state or federally funded activity. Program action may be generated, funded, and carried out entirely within a school system--even (and especially) in a rural, isolated system. It may as well be generated, funded, or conducted from without.

All program action, whether called a project, developmental plan, or experimental program, has several critical dimensions. The first of these concerns the objectives of the action; the second concerns unexpected (or concomitant) outcomes which may be products of either the substance of the action or of its tactical means. Typically, the latter are called 'innovation strategies.' Their consequence to program action is often the deciding factor in any 'success' or 'failure' which may be judged for the action.

Unexpected (or concomitant) outcomes occur, for example, as the effects on a building- or system-wide faculty of selecting certain indigenous personnel for positions of authority in the conduct of a program of action. These outcomes may in all cases be viewed as either primary influences of the school system socio-structure or of its attitudinal climate, morale, and sense of community. In any case, such outcomes need not be entirely unexpected. Careful, comprehensive planning, suggested here will expose the likelihood of such effects. Moreover, continued attention to the objectives of any program action will provide constant measures by which such effects can be detected, if these are obstacles or if they are essential to 'successful' program action.

The chief means by which unexpected (or concomitant) effects may be managed is formative evaluation. Formative evaluation, defined as outcome evaluation of intermediate or transitorial stages in the development of program action, should be built into any program action prior to its onset. Such evaluation concerns objectives already noted as being the other critical dimension to program action. The process of making and evaluating local educational change, violent or supercautious, resembles a continuous flow of behaviors about and around objectives. A priority of needs derives from careful assessments of needs and resources and a realistic formulation of those needs to extant and anticipated or hoped-for resources. Determination of the strategies most appropriate to not only the emergent priority needs but also to the context of each need occurs as the following step. The determination of strategies for program action directly responds to the objectives identified for the priority needs under attack.